# Estate & Trust Services

YES!

PorteBrown®
ACCOUNTANTS & ADVISORS

- Living Wills & Trusts
- Trust Planning
- Gift Tax Planning
- Charitable Trusts
- Residence Trusts
- Grantor Trusts
- Inheritance Tax Planning
- Exit Planning
- Probate-Avoid Strategies
- Asset Preservation
- Generation Skipping Strategies
- Gift & Estate Tax-Related Compliance

## Planning for the Future

Planning for retirement invariably comes down to making sure you save enough during your working years to build up a nest egg to use during your golden years. But what happens beyond retirement? Have you thought about your legacy and what you'll leave to your family and friends once you're gone?

Estate planning strategies can vary wildly from one individual to the next due to any number of financial factors, such as a person's business interests, investments, real property, or personal property. This is why it is a good idea to develop a plan according to your specific goals and outline how you want your assets distributed among your family.

For this reason, Porte Brown provides a wide range of estate planning services, which includes the set up and implementation of various types of trusts, developing gifting strategies, mitigating your estate tax exposure, and easing the burden of asset distribution.

Will Porte Brown help me set up an estate plan that fits my unique situation? **YES!**

Call us today to arrange a time to talk and see how we can help you plan for the future.

**phone:** 847-956-1040
**web:** www.portebrown.com

Porte Brown LLC provides comprehensive accounting services to individuals, businesses, and non-profits throughout Chicago and the suburban areas.

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## At Porte Brown, our strength lies in our experience. Our team includes:

- Certified Public Accountants (CPA)
- Chartered Global Management Accountants (CGMA)
- Certified Construction Industry Financial Professionals (CCIFPs)
- Certified Valuation Analysts (CVA)
- Certified Exit Planning Advisor (CEPA)
- Certified Divorce Financial Analyst (CDFA)
- Certified Information Technology Professionals (CITP)
- Certified QuickBooks Professional Advisors
- Intuit Premier Reseller (IPR)
- Microsoft Certified Professional (MCP)
- Microsoft Certified Technology Specialist (MCTS)
- Microsoft Small Business Specialist

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## Accounting & Business Solutions

In addition to our traditional accounting services, our technology experts help clients select, build systems with customized programs and reports, and provide onsite staff training and support. Our consultants are degreed accountants who have technical knowledge of numerous accounting software packages.

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