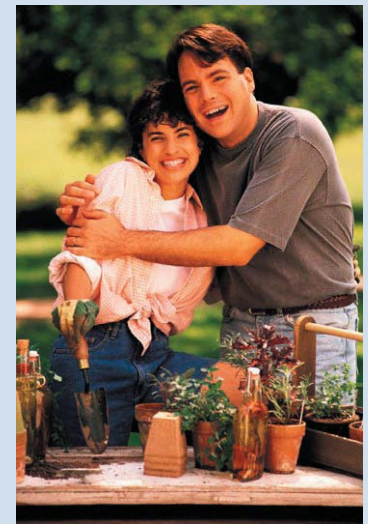


# Estate Planning Services

Regardless of your age or economic situation, proper planning is essential to ensure that your assets will be preserved and distributed according to your intentions. Successful estate and gift planning assists the orderly transfer of assets to your beneficiaries, provides security for your surviving spouse, and will reduce or eliminate the tax due on the transfer of your business and other assets. Strothman & Company takes a comprehensive approach to estate planning.

Our estate planning specialists will help you develop and implement strategies to include:

- Setting your personal goals and objectives
- Estimating your net worth
- Preserving and building your wealth
- Ensuring adequate retirement income
- Determining insurance needs
- Minimizing estate and other tax liabilities
- Maximizing trust, gifting and planned giving benefits
- Planning efficient transfer of your assets
- Monitoring and adjusting your estate plan as needed



Strothman & Company's estate planning specialists is comprised of CPAs with specialized training in estate, tax and trust matters. In addition, we have an attorney on staff who focuses on estate planning and related tax planning services.

Our advisors have experience serving family business owners, successful individuals and their families and understand the sensitivity needed in dealing with estate planning issues. Our practiced familiarity in this area gives us the heightened sensitivity our clients appreciate. We will help you ensure that the greatest value of your assets is ultimately transferred to your beneficiaries in an organized and efficient manner. Our dedication to estate planning provides you peace of mind.



## For more information contact

Ray Strothman CPA, ABV, CVA, CFF  
502.585.1600  
rstrothman@strothman.com