PRESTI & NAEGELE

ACCOUNTING OFFICES ACCOUNTING TECHNOLOGY CONSULTANTS

New York's Trusted Business Advisors

225 West 35th Street, 5th Floor. // NY, NY 10001

Phone: (212) 736-0055 // **Email:** info@pntax.com

PRESTI & NAEGELE

Personal & Family Solutions

WEALTH TRANSFER

Estate & Trust Tax Preparation

Effective estate and gift planning facilitates the orderly transfer of assets to your beneficiaries, provides security for your surviving spouse, and can reduce or eliminate the tax due on the transfer of your business and other assets. For business owners, providing for business continuity and succession of ownership is essential. We can guide you through the complex process of getting your financial affairs in order.

Succession Planning

Passing a business from one generation to the next can pass on family tradition, wealth and legacy. But succession planning involves more than just the transfer of business stocks or assets. Planning for the continued success of the business ensures that what you have built will continue to provide for the people and causes you care about most.

Simply because several family members are part of a management team does not ensure the business can survive transfer to the next generation. Planning for succession in the event of retirement or sudden loss of leadership ensures the stability and financial resources to survive. Presti & Naegele specializes in all aspects of closely-held businesses and family wealth planning. We apply our knowledge and experience to help our clients plan for multigenerational success.

Our Succession Planning services include:

- → Golden Handcuffs
- → Transferring Ownership
- → Positioning for Sale
- → Funded & Insured Buyouts
- → Negotiations
- → Financial Pro Formas
- → Buy-Sell Agreement Consultation

Estate & Gift Planning

Maximizing the value of wealth transferred to the people and causes that mean the most to you will require careful planning. Our estate and gift planning team assists with all areas of gift and estate planning, compliance and administration. We work closely with our clients and their families to help ensure that not only their wealth, but their values are passed down to future generations.

We start by planning for tax advantaged transfer of wealth. We also understand that for many clients, estate planning involves more than just maximizing the wealth that is passed on and minimizing tax. They desire that their wealth continues to provide, while also helping to instill the values and promoting the missions that are most important to them.
Every family has unique dynamics and objectives. We believe in providing estate planning strategies that reflect what is important to each individual client. We work to understand the goals of each client and the outcomes they hope to enable.

Our Estate and Gift Tax Services include:

- → Design of Estate Plans to Reduce Tax Liability and Maximize Wealth
- → Design, Establishment and Management of Charitable Trusts
- → Business and Real Estate Valuations to Maximize Value of Lifetime Gift Exclusions
- → Minority Ownership and Lack of Control Discounts
- → IRA Planning for Tax Minimization
- → Life Insurance Planning