
Estates, Gifts & Trusts

Overview

Estates, gifts, and trusts plans are the result of deep thought given to your family, your priorities, and your legacy; they reflect your truest intents. Given the volatile nature of the economy, however, these plans are subject to changing laws that may result in unintended effects.

BPM's approach towards estates, gifts, and trusts planning is proactive and strategic. Our objective is to work with you in developing a plan that meets your expectations and that also demonstrates foresight in the face of changing laws. We develop options that minimize your tax obligations to the greatest extent possible. With some advanced planning and the help of our accountants, feel the peace of mind in knowing that your family and wishes are cared for.