

MENU OF CONCIERGE SERVICES

Concierge services are tailored to the unique circumstances of the client. These services can include planning options whereby DeLoach, P.L.:

- Establishes regular meetings in client's preferred mode of communication (email, telephone, video conference, in-person, etc.);
- Identifies relevant advisors, and communicates and coordinates planning;
- Reviews and summarizes active estate planning documents, ensuring uniformity, coordination, and clear understanding;
- Provides guidance and coordination for trust formation, funding, transfers, and appropriate beneficiary designations;
- Updates estate planning documents annually for changes in circumstance, objectives, and the law;
- Identifies insurance contracts (life, property and casualty) and strategizes with insurance professionals on needed adjustments, if any;
- Maintains financial statement (asset list) with a focus on coordination with estate plan;
- Evaluates prior gifting and calculates unused lifetime exemption;
- Calculates potential estate tax liability;
- Analyzes planning options designed to minimize potential estate tax liability;
- Coordinates annual gifting, as well as related reporting;
- Facilitates annual family meetings, if desired;
- Forms new entities as required for overall planning objectives, when appropriate;
- Coordinates annual business meeting minutes and assists in maintaining company legal records, when appropriate; and
- Implements planning for business succession to ensure proper coordination with estate tax planning, when appropriate.