FMD
CPAs & Strategic Advisors
Strategic | Experienced | Connected

We provide strategic direction, tax, and financial reporting service solutions.

Estate Plan Checklist

- When was the last time you reviewed your estate plan?
- Have there been any changes in your family or your assets that would affect your plan?
- Are your assets titled properly for your plan?
- Do you have copies of your plan accessible?
- Is there a written document or summary of your intentions?

A Proactive Approach

FMD professionals continuously monitor tax and economic issues to assist with your business needs. Our proactive mindset also is manifested in the approach we take to assist you with strategic estate planning and wealth management.

Estate Planning & Wealth Management

In today's busy times, estate planning is often an overlooked area for many business owners and individuals with a myriad of concerns that should be addressed.

These concerns include:

- Disability
- Death
- Estate or Gift Tax Liability
- Transfer of Assets
- Asset Protection
- Managing Assets
- Business Succession
- Special Needs of Family Members

As your business and personal assets continue to evolve, your trusted advisor is here to help.

We treat our client's business and assets as our own for estate planning purposes.

We spend time reviewing your plans for your business and assets. The effort gives us the ability to assist you with your estate plan and guide you on a variety of documents, including:

- Trusts
- Wills
- Powers of Attorney

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