

Legacy assessments

CRAFTING LEGACIES THAT LAST

While death and taxes are inevitable, their consequences needn't be a surprise. A practical, step-by-step action plan to navigate the complexities of succession and estate tax liabilities can deliver peace of mind and continuity for the family and the family office during generational transitions. We look beyond the tax burden to address other potential consequences, recognizing that effective tax planning does not come at the expense of equally important outcomes.

Deloitte can help you analyze whether your legacy is preserved and your family office is poised for resilience and growth with proactive planning and audit readiness.

The legacy assessment cycle



OUR SERVICES

90-day drills

Identify essential financial, accounting, regulatory, and administrative actions needed immediately after an individual's passing.

Asset disposition

Analyze the disposition of specific, hard-to-value assets like large equity positions and unique real estate holdings.

Generational transition strategies

Address complexities in business and family office succession.

Audit preparation

Review reporting from prior gifts made to identify potential disclosure and audit risks.

Financial implications

Review estate tax liabilities and help analyze liquidity sources for these costs and other administration expenses.

Estate plan execution

Utilize estate planning legal documents and client financial statements to identify and quantify the flow of assets to beneficiaries, supporting alignment with the client's goals and objectives.

Tax planning

Utilize gift tax and generation skipping transfer tax exemptions and charitable planning to shift assets and potential appreciation outside of the donor's estate.

