



Hawkins, Ash, Baptie

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Certified Public Accountants | Business Advisors

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Real Solutions. Real Service.

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You have spent a lifetime building financial security, providing for your family, caring for your community. Having accomplished so much, you deserve the peace of mind knowing the fruits of your labor are protected. Solid estate planning shields your assets, reduces the estates taxes, and assures that your property and business will not be sold under duress to meet expenses. Most importantly, you have the confidence that those you love will be cared for according to your wishes.

Safeguarding your legacy is the primary focus of our estate planning group at Hawkins, Ash, Baptie and Company, LLP. With so many financial instruments available in estate planning, finding the right one for you is often a confounding experience. Which is the right trust for me – a revocable (living) trust or an irrevocable trust? What is a charitable remainder trust or a charitable income trust and should either be considered in my plan? How can I enhance my legacy through life insurance death benefits, gift tax exemptions and exclusions, and how can I maximize tax savings? Is there a way to avoid probate? We can answer these questions and clarify their significance in your plans.

The accountants of Hawkins, Ash, Baptie – with over fifty years of experience and proven ability in the field of estate planning – can look objectively at *your* needs and suggest the most appropriate choices to reach your individual estate planning goals. Each financial profile is very different; it is not a fill-in-the-blank proposition; thus your estate plan should be created solely for you and your needs.

There have been many paths you could have taken, but your good judgment has brought you to this point. Your experience in building your legacy, combined with our ability to walk you through the maze of tax law, will allow you to leave a gift that lasts for generations. We invite you to call and make an appointment with one of our tax professionals today.

***Estate Planning for the Legacy You Leave
Hawkins, Ash, Baptie & Co. for the Know-How You Need***