



## Team Approach

Our team is committed to helping you achieve your financial, personal and charitable objectives through effective wealth transition planning.

### Why are wealth transition services important?

Ongoing legislative changes have made the process of estate, gift and income tax planning more challenging, resulting in the potential for lost opportunities or uninformed decisions. Without assistance from experienced advisors, individuals may miss opportunities or encounter difficulties achieving their objectives.

Eide Bailly's wealth management team will work with you to reduce the uncertainties associated with wealth transition. You will have access to a seasoned team of advisors with significant experience in all aspects of wealth transition and tax planning. Team members will work closely with you, your family members and other outside advisors to develop strategies that help accomplish your financial, personal and charitable objectives, as well as provide effective tax planning.

### How will Eide Bailly's approach to wealth transition planning benefit me?

*If there were no limitations on what you could do with your assets, what would you do?* Using this question as a starting point, we will work with you to define your objectives and develop specific tactics to achieve them. Working together, we will develop a plan that takes full advantage of legislative opportunities, minimizes your tax liability and accomplishes your family, charitable and business goals.

It doesn't stop with creating a plan. You will work with our team members on an on-going basis to monitor the plan's effectiveness in meeting your objectives. Throughout the year, you will be provided with additional ideas and opportunities that may contribute to achieving your objectives.

Each member of Eide Bailly's wealth management team will provide insights and ideas on your plan. By providing you access to resources such as tax advisors, estate planners, business and financial advisors and valuation analysts, we can help guide you to successfully accomplish your goals.

### Why should I choose Eide Bailly?

Rather than viewing estate, gift and income tax issues as components separate from other aspects of your financial situation, Eide Bailly's team members take a holistic view of these topics. This allows us to develop solutions that are in alignment with your needs and help you accomplish your goals. You will receive personal attention from experienced professionals who will provide a well-rounded perspective on all issues related to wealth transition. Our commitment to helping you achieve your objectives and dreams is the true Eide Bailly difference.

### Experience the Eide Bailly Difference

877.355.8525 | [www.eidebailly.com](http://www.eidebailly.com)





## Director's Perspective

*“Our wealth transition team combines the art of understanding our clients’ needs and goals with the technical aspects of the transfer tax system to help clients accomplish their personal, financial and charitable objectives.”*

*~ David Zaudtke, CPA  
Director of Wealth Management  
Eide Bailly LLP*

## Planning Opportunities

Eide Bailly’s wealth management team will work with you to define your wealth transition goals and develop specific strategies to achieve them. The following is a sampling of planning opportunities that may be considered to help achieve your goals.

### Gift and Estate Planning Opportunities

- Review and Analysis of Current Estate Plans
- Annual Exclusion Gift Planning
- Lifetime Gifting
- Family Limited Partnerships (FLPs)
- Leveraged Net Gifts
- Intentionally Defective Grantor Trusts (IDGTs)
- Grantor Retained Annuity Trusts (GRATs)
- Qualified Personal Residence Trusts (QPRTs)
- Charitable Lead Trusts
- Charitable Remainder Trusts

### Income Tax Planning Opportunities

- Year-End Planning
- Transactional Planning
- Retirement Distribution Planning
- Roth Conversion Planning