Estate, Trust & Gift Tax Services

OUR INDUSTRY SPECIALISTS

Olsen Thielen estate and trust professionals dedicate their time to working with clients to coordinate a plan to protect their assets throughout every stage of their lives. Our team provides guidance to individuals, business owners, trustees, and executors with our tax planning, consulting, business succession planning, and fiduciary tax preparation services. To learn more, contact one of our industry specialists:

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LOCATIONS

2675 Long Lake Road
Roseville, MN 55113
651-483-4521

300 Prairie Center Drive #300
Eden Prairie, MN 55344
952-941-9242

WE SERVE YOU

Planning ahead can offer greater control and privacy, which is why estate planning is an essential part of an individual's overall financial plan. Although estate planning can be complex, an informed and well-designed plan can help ensure that your assets and loved ones are secure.

Our expertise in estate, trust, and gift taxation bring value to you by offering advice and solutions that address your unique needs and our team of experts will work with you in areas of tax compliance and planning so you can focus on and meet your individual and business goals.

TAX COMPLIANCE SERVICES

Olsen Thielen professionals are highly experienced in the following tax compliance areas:

- Preparation of federal estate tax returns (Form 706) and applicable state estate tax and inheritance returns
- Preparation of federal gift tax returns (Form 709)
- Preparation of fiduciary income tax returns (Form 1041) and planning to minimize taxes
- Preparation of judicial and non-judicial fiduciary accountings for estates and trusts

ADDITIONAL SERVICES

Olsen Thielen works with individuals, business owners, and executives to understand their goals. We then develop and implement strategies to help achieve those goals and minimize current and future tax liabilities.

- Assisting executors with the estate administration process including discussions relating to portability
- Assisting trustees with the trust administration process including the determination of distribution amounts and timing
- Post-mortem planning including disclaimers and allocation of generation-skipping transfer tax exemption
- Retirement planning including Individual Retirement Accounts (Roth and regular IRA) and qualified plan distributions to maximize family wealth and minimize income taxes
- Monitoring, implementing, and preparation of an estate plan to minimize estate and gift tax while maximizing family wealth, including review of wills and trusts, both revocable and irrevocable
- Closely-held business planning including business succession planning
- Family and charitable gifting strategies
- Asset protection consulting the formation of trusts and other entities

OlsenThielen CPAS AND ADVISORS

www.otcpas.com

Depend on **Our People.** *Count on* **Our Advice.**