GRASSI
ADVISORS & ACCOUNTANTS

Trust & Estate Administration

U.S. Estate Administration Services for Nonresidents

Your investments should fulfill your financial goals not only during your lifetime, but also after. Don't let the complexities of the probate process prevent your estate from transferring maximum value of U.S. assets to your beneficiaries.

Grassi's U.S.-based trust and estate professionals understand the local and federal tax laws governing post-mortem transfer of real property, trusts, brokerage accounts and other assets owned by nonresidents. They guide foreign nationals and their executors through the process of structuring and administering estates in every state, with an eye on minimizing tax obligations at every turn.

Services include:

- Structuring estate to avoid probate, if applicable
- Post-mortem income tax planning
- Administration of estate including assistance in the collection of assets
- Preparation of fiduciary tax returns on state and federal level
- Representation of estate before taxing authorities and negotiation of estate matters
- Preparation of annual accountings to minimize non-compliance risk
- Estate tax filings

Don't leave the distribution of your U.S. assets to chance. Grassi's Trust & Estate advisors ensure your estate is always positioned for maximum tax savings and protect your best interests in the probate courts.

To learn more about how Grassi's advisors can help your U.S. investments meet your long-term wealth preservation and transfer objectives, please contact Lisa Rispoli, Trust & Estate Services Leader, at 516.336.2444 or lrispoli@grassicpas.com.

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