Sol Schwartz & Associates, P.C.

Founded in 1980, Sol Schwartz & Associates, P.C. is a prime San Antonio, Texas-based, full-service accounting firm. We provide high quality accounting, tax, and advisory services with a personal touch to a wide range of business, individual, and international clients.

Why Sol Schwartz & Associates, P.C.
Wealth management and preservation are lifelong processes marked by complex decisions. We offer sophisticated strategies to minimize taxes and preserve what you have earned. We tailor programs to your unique situation by offering information, advice, and solutions to complex issues. Enjoy effective coordination of financial, legal, and risk management goals. Our professionals will act as advisors for estate planning, income tax planning, and asset protection.

In addition to the experience of our firm’s own staff in San Antonio, we also have access to extensive worldwide resources through our membership in CPAmerica International and business alliance with Crowe Global.
Services

We focus on accumulating assets during our lifetimes without really considering what happens to those assets after we’re gone. But did you know that proper planning can help increase the size of your estate? It can also help you choose how your assets will be distributed after you are gone, help assure that it is distributed in an orderly and efficient way, and minimize taxes. Sol Schwartz & Associates can provide a road map for the estate and gift planning process, help lessen the administrative burden on your family and heirs, and enable you to approach your attorney and advisors with a clear and concise strategy.

Estate and gift tax planning strategies may include:

• Employing different types of charitable trusts that benefit your family and charters.
• Using irrevocable life insurance trusts.
• Developing gifting strategies to maximize your annual gift exclusion and generation while skipping transfer tax exemption.
• Using grantor retained annuity trusts and intentionally defective grantor trusts to transfer the appreciation of your assets to future generations while avoiding the estate tax.
Is your estate in order? A checklist.

Can you answer “yes” to these questions? A good estate plan will answer all of these questions. It will also help minimize taxes and plan for the transfer of your estate according to your wishes.

• Has someone agreed to raise your children if there is an untimely death or deaths?
• Do you have a source of liquid funds for your family’s security if there is an untimely death or significant disability?
• Do you have a will?
• Have you named an estate executor?
• Have you considered a living trust?
• Have you named someone to handle your affairs if you become incapacitated?
• Have you designated medical and financial powers of attorney?
• If you become terminally ill and are unable to act for yourself, do you know who will make decisions regarding your medical care?
• Do you have a plan to determine what happens to your family-owned business upon your death or disability?
• Are you sure your estate assets will wind up in the right hands?
• Are you sure the beneficiary designations in your retirement plans, IRA accounts and life insurance policies provide for the lowest transfer tax?
• Have you considered lifetime gifts to transfer part of your wealth or avoid estate taxes?
Transferring your wealth

“My estate is too small to worry about estate taxes.”

“Everything is set up to go to my spouse at death, so I don’t need an estate plan.”

“I don’t need to worry about estate planning now. I’ll worry about it when I’m older.”

You may have heard these excuses or others like them. You may have even used them yourself to avoid addressing an uncomfortable topic—your own mortality.

The unfortunate truth is that not having a well-crafted estate plan could cost your beneficiaries almost half of your wealth upon your death. This, coupled with the possible lack of liquid assets to pay estate taxes, could cause your heirs unnecessary problems.

We would like to help you capitalize on the powerful tools available for proper estate planning.
Too often a CPA does not participate in his or her client’s estate planning process and, simply put, the absence of such participation leaves the process woefully incomplete.

Our professionals are uniquely suited to participate in the planning and administration of our clients’ estates, and can be extremely valuable in minimizing the wealth transfer tax burden and wealth administration tasks of future generations.

Jeff Jackson, CPA, Shareholder | P 210.384.8000 x 144 | jbj@ssacpa.com
Jeff has been a certified public accountant since 1992 and focuses on all areas of taxation and financial planning, including individual, partnership, and corporate income taxation, along with estate, gift, and retirement planning. He relies on his business and investment experience to identify the many issues his clients may face, particularly in working with high net-worth individuals, their families, and closely-held businesses. Jeff served as President of the San Antonio Estate Planners Council for the 2014-2015 year and continues to author articles and speak on various tax planning issues.

Jeff Albrecht, CPA, Shareholder | P 210.384.8000 x 113 | jeffa@ssacpa.com
As a practicing public accountant since 1980 with IRS training, Jeff has been involved in all areas of tax planning, including individual, corporate, and partnerships. Jeff has worked extensively in areas of trust income taxation, asset protection, succession and estate planning, like-kind exchanges, entity planning, the sale/purchase of businesses, depreciation analyses, gift planning and charitable foundations.

Bennett Allison, CPA, CFPTM, Shareholder | P 210.384.8000 x 138 | cba@ssacpa.com
Bennett Allison has practiced public accounting for over 20 years. He provides tax planning and preparation services to a wide variety of clients. Bennett’s client base includes both local and multi-state businesses. He assists with entity planning/structuring as well as preparation of partnership, S corporation, C corporation, non-profit, and state returns.
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