Estate Planning

Hendry Warren LLP Chartered Professional Accountants
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Estate planning is more than having a Will.

Estate planning is a critical roadmap for you and your family.

- ➔ Understanding your family dynamics and goals
- ➔ Reducing taxes and preserving wealth for your heirs
- ➔ Ensuring your testamentary objectives will not be frustrated
- ➔ Optimizing estate administration and post-mortem planning
- ➔ Ensuring assets with sentimental value can be kept in the family
- ➔ Planning to ensure there is sufficient estate liquidity to fund taxes and other expenses

Our Team

Spencer and Josh are both Canadian income tax specialists and hold the **Trust and Estate Practitioner (TEP)** designation. The TEP is an internationally recognized designation reflecting the holder as having an advanced knowledge of trusts and estates. Spencer and Josh bring this advanced knowledge along with their tax and estate planning experience to each estate plan.

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Services

We have experience in estate planning for individuals of all ages and throughout Canada with a wide variety of assets and structures including high-net-worth individuals. Some of the assets and structures we have advised on include private corporation shares, family trusts, alter-ego and joint spousal trusts, private foundations, family cottages, principal residences, investment properties, TFSA and RRSP/RRIFs and stock market investment portfolios. We assist with all stages of your estate plan and related tax and financial reporting compliance requirements. A summary of the services we can provide as part of your estate planning needs are outlined on the next page.

Services

- Calculation of your terminal income tax and Ontario Estate Administration Tax liability (Ontario probate) and providing recommendations on how to reduce or eliminate these taxes
- Summarize your total net worth which includes your assets and liabilities and what your beneficiaries will inherit
- Identification of areas of concern based on your asset mix
- Outline of post-mortem planning techniques if you own shares of private corporations necessary to eliminate double tax
- Review of Wills and trust documents for income tax, probate, and distribution planning
- Recommendations on how to optimize beneficiary designations for registered accounts and life insurance policies
- Review the ownership structure of your assets and provide recommendations for simplification or optimization
- Business and property succession planning
- Charitable and philanthropic planning
- Trust and insurance planning
- Advice on US estate tax exposure

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Services

Upon the completion of your personalized estate plan, you will receive the following:

- ➔ **Detailed Estate Planning Memorandum** that outlines your estate plan that concludes with a succinct summary of our recommendations.
- ➔ **Meeting** with you and your family to review your estate plan recommendations, answer your questions and to discuss what steps are needed to implement your plan.
- ➔ **Coordination** with your other advisors where required to **implement** recommendations from your estate plan.

How To Get Started

Reach out to any member of our estate planning team if you have any questions or would like to move forward with your estate plan. We will arrange a preliminary call to go over the process and next steps. We will also provide you a copy of our detailed estate planning checklist to help you gather the necessary information. Our fees for a customized estate plan will vary depending on the complexity of your assets and your objectives. We would be pleased to speak with you to discuss your circumstances and provide a fee quote in advance.

Contact Us

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