Inheritance and Gifts Tax

We know that losing a loved one and dealing with the subsequent tax implications can be overwhelming. Our U.S. tax experts fully understand the necessary filings and will be at your side throughout the entire process. We are here to assist you with anything related to inheritance tax, federal gift tax, inheritance planning and all other aspects of tax advice.

Very often, only an informational filing is needed to fulfill your U.S. tax filing requirements when receiving an inheritance. As of 2018, you can gift up to $15,000 to each recipient without having any filing requirements. Our staff is on hand to help make sure filings are done swiftly and professionally.  Additionally, we work in partnership with a strong network of wealth management advisors who have decades of experience investing funds in tax efficient strategies.

***Our experts are here to:***

* Prepare all relevant inheritance or gift tax forms, including back filing of any of these documents.
* Advise on investments to avoid double taxation.
* Help obtain appropriate certification (transfer certificate) to facilitate transferring the funds.