

ESTATE PLANNING SERVICES

MAKING THE MOST OF A LIFETIME

For most people, the estate planning process should start as early as their 40s, focusing foremost on a secure and healthy financial life. Developing a thorough professional plan for your estate may require interacting directly with your attorney, banker, stock broker, insurance agent and pension plan advisor, not just with you and your spouse. As your accountant, we are well-positioned to lead your financial advisory team seamlessly to ensure your overall plan is organized and executed properly.

Rushton provides business and personal counsel in a myriad of estate planning areas such as compiling asset inventories, protecting assets and transferring land titles and other estate properties. And our estate planning team consists of independent, fee-based consultants, so we receive no commissions from any financial products we may incorporate into your plan. Our interest is strictly optimizing your financial future.

At Rushton, we believe financial planning and estate planning should work hand-in-hand to balance present needs for living with future wishes after passing on.

That's why our Estate Planning team offers the following services:

- An orchestrated estate planning team
- Independent analysis
- A full-scale, coordinated program
- Asset administration for individuals, trusts or estates
- Asset allocation
- Succession planning
- Charitable remainder trust planning



Perry C. Barnett,
CPA, Partner

With over 20 years of taxation experience, Perry works with the Estate Planning division and is also responsible for the firm's Business Services division. He specializes in tax and estate planning, business formation and succession planning.

Barclay Rushton,
CPA, Founding Partner

Barclay Rushton is a senior tax partner whose areas of expertise include business valuation, tax and estate planning. With nearly 30 years of experience, he also oversees the firm's Medical Services division, specializing in business and estate planning for physicians and their practices.



ABOUT OUR FIRM

One of Northeast Georgia's largest accounting firms with nearly 1,000 clients, Rushton was founded in Gainesville in 1981. With a staff of more than 30 employees, the firm serves a broad regional base with a full spectrum of business accounting, planning and consulting services.

The Rushton team is available to help you now by overseeing payment of your bills and other financial affairs, or with a longer-term administration of your trust or estate to ensure all financial goals are met. Let us help you plan for your future and beyond. Call us any time for a consultation.



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