TRUST ADVICE NEWS

Newsletter Focusing On Important Estate Planning Trends

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Serving Southern California's Estate Planning Needs Since 1995

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Trust Advice News
Newsletter

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Thank you.

EXPANDED TAX SERVICES OFFERED

The Law Firm of Richard O. Barndt is pleased to announce that it will be offering individual income tax preparation services starting immediately, including IRS Form 1040 and California Form 540 tax returns, including the ability to e-File your individual income tax returns.

This firm has traditionally prepared estate tax returns and gift tax returns in conjunction with providing estate administration services. However, many clients have expressed a desire that we assist them with their annual individual income tax returns. Now we do.

In addition to individual income tax returns, this firm will also prepare trust income tax returns, such as the IRS Form 1041 and California Form 541 tax returns.

These new income tax return preparation services are intended as an expansion of our services and to compliment our pre-existing estate planning and administration services. We will still provide our usual estate planning and estate administration services as we have in the past.

Whether you are an existing client, or wish to become a new client, please call our office and ask for a "tax appointment" to get started.

NEW E-NEWSLETTER FORMAT

As a sign of the times, the Trust Advice News newsletter will convert to the e-Newsletter format commencing immediately. This means that all future issues of the Trust Advice E-Newsletter will be distributed via email only. This issue will be the last issue delivered by US Mail.

Research has shown that people prefer to be contacted via email by businesses with which they have an existing relationship. From the practical side, e-Newsletters require less time to compose and are less expensive to distribute.

Persons wishing to sign up for the Trust Advice E-Newsletter can either: (1) visit our website at www.TrustAdvice.com and sign up there; or (2) complete the simple form on the back side of this page and return it to us.

All we need is your name and email address. If you and your spouse have different email addresses, we encourage you both to sign up individually. We do not sell your information, and you can easily un-subscribe at any time.

The Trust Advice E-Newsletter is a periodic newsletter authored by attorney Richard O. Barndt, which is dedicated to important estate planning issues.

The next issue of the Trust Advice E-Newsletter will discuss FDIC Insurance as it relates to revocable living trusts. Many of our clients have their bank accounts owned by their revocable living trusts. Due to recent bank failures, many clients have questions as to how much FDIC insurance coverage these accounts are afforded.

Information they have received has often been incomplete and confusing. We will explain in simple terms the basics of FDIC insurance as it relates to revocable living trusts. We will also give some common examples so you can begin to understand how your revocable living trust affects your FDIC insurance coverage.

Trust Advice E-Newsletter sign-up form. Complete and return. Thank you.

Name:______________________________

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Name:______________________________

Email:______________________________

Attorney Richard O. Barndt has been providing estate planning services in Southern California for over 13 years. He holds a Bachelors Degree in Electrical Engineering, a Juris Doctor, and a Masters Degree in Taxation. Attorney Barndt's practice includes Revocable Living Trusts, Irrevocable Trusts, Financial Durable Powers of Attorneys, Health Care Directives, Trust Administration, Gift and Estate Tax Panning, Gift and Estate Tax Return Preparation, and Individual Income Tax Return and Trust Income Tax Return Preparation.

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