



ESTATE & SUCCESSION PLANNING

Preserve What You've Built. Plan for What's Next.

Building a successful business and accumulating wealth takes years of hard work. A thoughtful estate and succession plan helps protect those achievements while creating a clear path for the future.

ELO CPAs & Advisors helps business owners, families, and individuals develop strategies that support a smooth transition of assets, leadership, and ownership while minimizing unexpected challenges along the way.

The ELO Difference

Estate and succession planning involves more than legal documents. It requires careful consideration of financial goals, family dynamics, tax implications, and long-term business objectives.

ELO works with clients and their professional advisors to develop plans that help protect assets, preserve business continuity, and prepare future generations for success.

- ✓ Personalized planning strategies
- ✓ Business succession and ownership transition support
- ✓ Coordination with legal and financial advisors
- ✓ Tax-aware planning considerations
- ✓ Guidance for long-term family and business goals

Our Services

Estate Planning Support

- Estate Planning Strategies
- Wealth Transfer Planning
- Gift Planning Considerations
- Family Legacy Planning

Business Succession Planning

- Ownership Transition Planning
- Family Business Succession
- Buy/Sell Agreement Planning
- Leadership Transition Strategies

Valuation & Tax Considerations

- Business Valuation Services
- Estate & Gift Valuations
- Tax Planning Strategies
- Long-Term Transition Planning

Plan with Confidence

Whether you're preparing to transfer a business, preserve family wealth, or create a long-term legacy, ELO can help you develop a plan that supports your goals and provides peace of mind for the future.

TALK TO AN EXPERT at ELO CPAs & Advisors Today!

605-996-7717

elocpa.com