ACCOUNTING

HELP FOR YOUR NEW ROLE AS A FIDUCIARY

If you've been named a fiduciary, you may have found yourself suddenly put in charge of a stack of statements and legal documents but with no idea what to do with it or where to start. It can be overwhelming to be responsible for another's assets and to have to work with family and friends to see that those assets are managed and ultimately distributed in accordance with the wishes of the deceased person. There are a lot of questions that could be going through your mind – "do I need to engage an attorney," "how do I access funds to pay final expenses," etc. The good news is, you don't have to feel bewildered or handle the process all by yourself.

With a background in legal services as well as tax and accounting, Kathleen MacLean is the Director of Estate Planning and Tax Compliance at **Abare, Kresge and Associates**, and she is ready to be your resource. Years of experience working as a paralegal in estate planning and taxation as well as many years as a certified public accountant has given her a unique perspective on what it takes to work successfully with an individual or family who finds themselves in need of guidance after the loss of a family member or loved one. In her role at the firm, Kathleen specializes in tax planning and compliance for trusts and estates, working with trustees of a trust or personal representatives of an estate. "I work to make my clients' experience as a fiduciary less stressful and more manageable," says Kathleen. With a wealth of experience and expertise, Kathleen and the team at Abare, Kresge & Associates are always willing to take on new challenges. Their goal is to build relationships of trust so clients know that they are the top priority and the firm is looking out for their best interests. "We feel that if we can foster relationships with our clients," says Kathleen, "our firm will be successful in serving multiple generations of their families."

Serving St. Augustine since 1989, Abare, Kresge & Associates CPAs, LLC has built a reputation of excellence through years of diligently serving their clients and offering expertise in a large range of services, including audit, review, and other attestation services, tax planning and preparation, business planning and business valuation, forensic accounting, litigation support, IRS representation, accounting information services, and estate and trust matters. "Our business works best if we have good relationships with our clients so that they feel free to speak to us about anything and everything affecting their lives and finances," says Kathleen. "We try to provide a personal and satisfying experience for everyone who chooses to work with us. Our team considers it a privilege to do so."

"You don't need to become overwhelmed by your duties as a fiduciary. Kathleen and her team are here to make the role more manageable.