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KEY FIGURES

- \$11,700,000- 2021 Gift, estate, and GST exclusion amount
- \$15,000 Annual Gift Tax Exclusion



TEAM OF PROFESSIONALS

Having a group of qualified professionals (e.g. Attorney, CPA, Financial Advisor*) collaborate on your behalf and customize your estate plan may help increase the likelihood of a smooth transition of your wealth to your loved ones. Consider consulting with them as your goals and situation changes.

*Investment advisory services offered through Apeiron RIA, LLC.

