

# ARCHFORD ASSISTANCE WITH ESTATE PLANNING



At Archford, we aim to simplify the estate planning process, from the creation of the estate planning documents to the estate administration after the passing of a client. This assistance is summarized below:

## **STEP 1 - GATHER AND REVIEW CURRENT DOCUMENTS (as applicable)**

- ❖ Gather all the current estate planning documents.
- ❖ Gather any gift tax returns filed to date.
- ❖ Gather any trust income tax returns filed to date.
- ❖ Gather all the LLC, Partnership and real estate documents.
- ❖ Gather all information on other assets owned.

## **STEP 2 - CREATE FLOWCHART TO MAP ALL ASSETS TO ESTATE PLAN**

- ❖ Flowchart the existing estate plan and map asset flow under governing trust document.
- ❖ Create projected valuation of assets in Revocable Trust.
- ❖ Map any assets previously gifted or sold to an Irrevocable trust.

## **STEP 3 - DISCUSS CURRENT ESTATE PLAN MAPPING TO DESIRED ESTATE PLAN**

- ❖ Discuss family vs. corporate trustee choice (Archford Trust Service).
- ❖ Discuss desired asset distribution if different from current mapping.
- ❖ Determine what changes need to be made to estate plan to match desired plan.
- ❖ Discuss if insurance plays a role in investment review with Buckley Financial.

## **STEP 4 - WORK WITH OUTSIDE ESTATE PLANNING ATTORNEY**

- ❖ Provide estate planning attorney recommendations to client as needed to assist client with implementation of estate plan updates.
- ❖ Create a memo to share with drafting attorney to assist with updating conversation between client and drafting attorney.
- ❖ Participate (with client's consent) in the estate planning discussions.
- ❖ Review draft estate planning documents.

## **STEP 5 - ASSIST WITH TRUST FUNDING**

- ❖ Assist with the re-titling of assets into the name of the trust(s) and coordination of beneficiary designations to complement the trust distribution plan.
- ❖ Work with the estate planning attorney to handle any real estate deeds or company LLC/Corporation transfers to the trust(s).

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## STEP 6 - ESTATE TAX PROJECTIONS (as applicable)

- ❖ Calculate projected federal (and state) estate tax due at death now and after sunset of current estate tax law.
- ❖ Discuss additional strategies to reduce or eliminate the death taxes.

## STEP 7 - FAMILY CONVERSATION ON NEW OR UPDATED ESTATE PLAN (recommended)

- ❖ Update flowchart based on newly executed documents.
- ❖ Provide an opportunity, if requested by client, to go over estate planning documents with their children for how estate would be handled.

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## **ABOUT JEFF**

Jeff Keiser serves as the Chief Legal Officer & Director of Family Office Services for Archford. His objective is to help position your family's wealth in a tax efficient manner and with a generational mindset.

He brings to the table nearly 40 years of experience in tax, retirement, estate, and financial planning, having held leadership positions at a large private bank and a national trust company. Jeff earned the Accredited Estate Planner designation from the National Association of Estate Planning Councils. He is a member of the St. Louis Estate Planning Council, the Kansas City Estate Planning Society and the Missouri Bar Association's Trust & Probate Committee.

Jeff obtained his JD from the University of Missouri - Kansas City. He then taught classes at the K.C. Chapter of the American Institute of Banking, Maple Woods Community College and Park University.

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## **ABOUT JD**

James "JD" Maher, Jr. serves as an Estate Planning Specialist for Archford. In his position he assists his estate planning team through all the complexities of the job while ensuring that clients receive the best possible service. As a past intern and Archford Scholar, he's been able to witness and contribute to the growth of the firm and contribute his knowledge in estate planning to better serve our clients.

He completed his Bachelor of Science in Finance and Juris Doctorate from the University of Missouri - Columbia. In 2025, JD received a Master of Arts in Philanthropy (MA) from Indiana University - Indianapolis Lilly Family School of Philanthropy and a Chartered Advisor in Philanthropy (CAP) designation from The American College of Financial Services.

JD possesses a passion for helping others, driven by his personal experience of receiving two life-saving liver transplants early on in his life. Grateful for the kindness and support he received during those challenging times, he has dedicated his professional journey to making a positive impact on the lives of others. In his free time, he enjoys spending time with friends and family, playing golf, supporting Mizzou, and attending sporting events - especially those where his younger brothers play soccer.