HIGH NET WORTH

A team built around you, your family and your finances.

You've worked so hard to build your wealth, you deserve a partner that works just as hard to secure your legacy. At Maner Costerisan, our team of experts take a holistic approach to maximizing your after-tax wealth. Based on your financial goals and needs, let our team develop solutions that coordinate your estate plan, wealth management, strategic tax planning and more . We strive to create customized financial and tax solutions that will help you grow and safeguard your wealth. From using technology to map out financial projections and forecasts to keeping up with and staying ahead of legislative changes, we know success is in the details. Let our team make the most of the opportunities available to you so that you can spend your time building your legacy and memories that will be passed on for generations.

Expertise in action:

5-Star Rating
Client Satisfaction

eMoney
advisory ALPHA

Strong Industry Partnerships

GLEPC

Active in the Greater Lansing Estate Planning Council

Maner Costerisan

manercpa.com | 517.323.7500

Get a trusted team focused on you.

More wealth means more complexity, but it also means more possibilities. Our experienced team is ready to support you in achieving your financial and wealth transfer goals. From offering smarter approaches to taxes to helping you prepare for retirement and ensuring your estate plan is inclusive of all major considerations, we strive to preserve your wealth, fulfill your financial goals and maximize your after-tax net worth.

Wealth Management

Our team offers deeper, complex and integrated solutions to do more with your money. We work to protect and grow your wealth from every angle, bringing together expertise from across the firm in key areas, including individual, estate, trust and gift tax consulting to charitable giving, investments and retirement planning. Our team of experts take a holistic approach to create a customized financial plan tailored around what you want to achieve from your life and your retirement.

High Net Worth Tax Planning

Those who face large tax challenges and burdens deserve a dedicated team with IRS experience to match. We get to know you, your financial individual and family goals, and use our experience to pro-actively identify tax-saving opportunities. We understand paying income tax is not a charitable contribution and we work hard to keep your hard earned money in your pocket.

Estate Planning

Planning for the future with a well-crafted estate plan ensures your legacy endures and your loved ones are cared for according to your wishes. As your holistic team of advisors, we work alongside your legal counsel to develop and implement a comprehensive estate plan that combines tax and financial planning strategies to help preserve your wealth for future generations. By clearly defining your plan to transfer wealth and using strategies that minimize costs and taxes, we can help you create a legacy that aligns with your personal values and goals. And, most important, enables a smooth estate transition without unnecessary drama or costs.

> **"The Maner Costerisan team is knowledgeable and efficient.** They made some additional tax-savings recommendations of which we might otherwise not have taken advantage. We're completely satisfied."
>
> *-Satisfied Client*

Trust & Estates

Being named as a trustee or personal representative can be such an honor, but also requires a significant amount of time, energy and uncertainty. Let our compliance experts help you navigate this role and your fiduciary duties. From reviewing trust documents to determine how assets are to be managed and distributed, to producing accurate accountings, assisting with probate requirements and completing appropriate tax filings, we can help you fulfill your responsibilities with ease.

Succession Planning

You've poured your heart and soul into making your business a success. We partner with you to develop the right plan that allows you to move on from the business under your own terms. We have the conversations early and build a strategy that focuses on strengthening your company, improving profitability, reducing overall risk and maximizing value. Whether your end goal is to sell, transition or gift your business, we're there to support you every step of the way.

Ready to grow your wealth with our wealth of experience?
Talk To An Expert:

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