Think Ahead: Expert Advice on Personal Audit Risk

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This week's newsletter is highlights our latest podcast, one of Evergreen Gavekal's wealth advisors Kaeli Kaainoa, CFP® & CEPA, sits down with our most recent addition to our team, Melissa Hilty, an attorney with an LLM in Taxation and over 15 years of experience with the IRS. They discuss her extensive tax expertise, the invaluable lessons learned from her litigation career, and how she will support our clients with her deep knowledge of tax code. The conversation highlights risk management by sharing reasons why some ultra-high-net-worth families may get audited. The discussion then dives into effective tax planning strategies, such as implementing Spousal Lifetime Access Trusts (SLATs) in anticipation of the sunset of the Tax Cuts and Jobs Act (TCJA). This episode is a must-listen for anyone looking to optimize their tax strategies and avoid costly mistakes.

Explore Our Private Wealth Page