



DUFFY KRUSPODIN
CPAs & Trusted Advisors

Trusted Tax Support Through Life's Transitions.

Estate & Trust Tax Services



When life changes lead to estate or tax responsibilities, such as a loved one passing, a trust becoming active, or a gift raising tax questions, the next steps aren't always clear. That's where we come in. Duffy Kruspodin, LLP helps families, fiduciaries, and their advisors navigate these obligations—accurately, respectfully, and without delay. Whether you're preparing a return, gathering documentation, or coordinating with attorneys, our team provides clear guidance, reliable support, and experienced insight.

OUR ROLE IN THE ESTATE JOURNEY

Phase	Our Support
Key Life Events	Help clients assess readiness and navigate new complexities after major life changes.
Planning	Provide tax-side support on estate strategy, charitable planning, and entity evaluation.
Implementation	Coordinate with legal counsel and financial advisors to assist with trust funding, prepare tax filings, and support asset alignment.
Administration	Support fiduciary reporting and valuations by gathering information and preparing documentation for legal counsel or trustees.
Compliance	Prepare estate, gift, and fiduciary income tax returns.
Resolution	Support audits and disputes by gathering documentation and preparing financial analysis for use by legal counsel.

What Sets Our Estate & Trust Services Apart

Focused Expertise

We bring decades of experience helping clients and their advisors navigate estate-related tax and compliance matters with accuracy and discretion.

Collaborative Approach

We integrate seamlessly with attorneys, wealth advisors, and fiduciaries - offering clear tax-side support, not overstepping legal or planning roles.

Trusted Technical Execution

From Form 706 to complex fiduciary reporting, we help clients meet obligations confidently and avoid costly missteps.

Key Services

- Tax planning for Estates & Trusts, including gifting strategies and estate-driven gift planning
- Estate, gift, and fiduciary income tax return preparation (706, 709, 1041)
- Trust funding and asset inventory support
- Audit support
- Entity and charitable planning input (advisor-led)

We Also Collaborate On

- Annual financial health reviews
- Estate planning
- Legacy planning with attorneys and wealth advisors



Here When It Matters Most - Let's Talk.

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Duffy Kruspodin, LLP is a CPA and advisory firm with offices in Woodland Hills, San Diego, Beverly Hills, and Irvine, serving business owners, finance leaders, and families across California and beyond. With more than 200 professionals and over 35 years in practice, we provide tax, accounting, audit, and operational support with a steady, people-first approach. Clients turn to us for more than year-end filings - they count on us for responsive service, informed advice, and a team that follows through. Whether you're growing a business or managing generational wealth, we're here for the work ahead.

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