ALPERIN LAW
500 Viking Dr Ste 202
Virginia Beach, VA 23452-7487

January 2025 Issue

SPECIAL EDITION

INTRODUCING ALPERIN LAW AND WEALTH

As your estate planners, our job has traditionally been to make sure your legacy is protected. But we all know that there's much more to your financial life than just your estate plan. For many, managing taxes, financial planning and legal matters can feel like juggling too many balls in the air at once. You might find yourself getting conflicting advice from different advisors, spending time trying to align their recommendations and wondering if any one advisor is looking at the big picture. We understand how frustrating this can be—and that's why we created Alperin Law and Wealth. Learn more in this special edition of the Alperin Law and Wealth newsletter.

OFFICE LOCATIONS

Multiple office locations for your convenience.

Virginia Beach (Main Office)
500 Viking Drive, Suite 202

Norfolk Office
319 W. 21st St., Suite B

Suffolk Office
3345 Bridge Road, Suite 916

Give us a call!
Phone: 757-530-7011
Fax: 757-233-360
www.alperinlaw.com
Hours: M-TH 9:00 AM - 5:00 PM, F 9:00 AM - 12:00 PM

UPCOMING SEMINARS & WEBINARS

IN-PERSON SEMINARS	Plan Now To Protect Your Loved Ones	Tuesday, January 21st at 11:00 AM	Scan to register
ONLINE WEBINARS	The ABCs of Successfully Acting as a Successor Trustee	Tuesday, February 11th at 2:00 PM	Scan to register
IN-PERSON SEMINARS	The ABCs of Successfully Acting as a Successor Trustee	Thursday, January 30th at 6:00 PM	Scan to register

ALPERIN LAW & WEALTH

Planning & Protecting

SPECIAL EDITION

Finally-You Can Take Control of Your Financial Future!

We are pleased to announce that **Alperin Law** is now
Alperin Law and Wealth*:
Integrated Legal, Tax and Wealth Planning
Your All-In-One Advisory Solution

Imagine Your Financial Dream Team

IMAGINE sitting in our private conference room, surrounded by a seasoned estate planning attorney, a tax attorney and strategist, and an experienced financial advisor—all focused on creating a customized plan that optimizes every aspect of your financial life. This vision has been my dream since I started practicing estate planning nearly thirty years ago, and now it is a reality. I'm excited to share that Alperin Law has evolved to Alperin Law and Wealth.

We're thrilled to bring you integrated legal, tax and wealth planning services—a unique collaboration that few firms offer but is a key to ensuring your long-term success.

The Three Pillars of an Effective Plan

While coordinating between your attorney, financial advisor, and CPA is essential to creating a plan that truly works for you, it's a reality that most advisors don't collaborate effectively—or at all. This disconnect often leaves critical gaps in your strategy. At Alperin Law and Wealth, we've changed that for your benefit. By integrating legal, tax, and wealth planning services under one roof, we provide a level of teamwork and precision that's hard to find elsewhere, giving you a fully aligned plan tailored to your goals.

Our integrated approach eliminates the burden of managing these relationships yourself and ensures your plan includes:

- **Legal Planning:** Estate planning, business planning (if applicable), and asset protection.
- **Tax Minimization:** Beyond just tax return preparation.
- **Wealth Management:** Optimizing investments and account/beneficiary designations.

*Wealth planning and management is provided through Alperin Financial Solutions, LLC, a Registered Investment Advisor. Legal services and Tax advice are provided through Alperin Law PLLC. Disclosures regarding the affiliation between Alperin Law PLLC and Alperin Financial Solutions, LLC are furnished prior to engagement for any integrated legal, tax and wealth planning services.

Do You Really Know Whether Your CPA and Financial Advisor are Acting in Your Best Interests?

At Alperin Law, we've always prioritized providing superior, personalized legal representation, acting in our clients' best interests as fiduciaries. Naturally, we've assumed that the other advisors with whom our clients work —like CPAs and financial advisors—uphold the same high standards. But over the years, we've learned that this isn't always the case. In fact, our clients are often surprised to learn that their CPAs and financial advisors may not be held to the same legal and ethical obligations as their attorney.

- While CPAs are expected to act with integrity and competence, they aren't required to act solely in your best interest to save you on taxes.

- Similarly, unless your financial advisor is a Registered Investment Advisor or Certified Financial Planner, they're only required to provide "suitable" advice—not necessarily the best advice for you.

This doesn't mean your current advisors aren't acting in good faith, but without a fiduciary obligation, how can you be sure? Most people aren't tax or financial experts, which is why they hire professionals in the first place. We've introduced Alperin Law and Wealth to make sure you're getting legal, tax, and wealth planning advice that is truly in your best interests- in house. With us, you'll have a team you can trust, ensuring your entire plan is aligned for your success.

Discover the Benefit of Coordinated Advice You Can Rely On

By engaging one team of professionals working together, you can align your financial strategies, eliminate guesswork, and ensure that your attorney and advisors are proactively guiding you toward your goals. No longer will you need to meet with a separate financial advisor or CPA to ensure that your overall plan works for you and your family, and no longer will you have to wonder whether you are getting legal, tax and financial advice that you can trust is best for you and your family.

At Alperin Law and Wealth, we bring together experienced attorneys, tax advisors, and financial planners under one roof. This collaborative approach ensures that every aspect of your financial life is carefully coordinated and calculated to achieve your goals. Here's how we do it:

Meet Our Team

1. **Initial Comprehensive Assessment:** We begin with an in-depth review of your legal, financial, and tax situation. This includes understanding your goals, family dynamics, and long-term aspirations. We also review: (a) your existing investments to determine whether your investments are appropriate and you are paying a fair fee for the advice and financial products and services that you are receiving; (b) your tax returns to ensure that you are taking advantage of strategies to help minimize your taxes; and (c) your existing estate plan to verify that it is consistent with the legacy you wish to leave for your loved ones.
2. **Customized Strategy Development:** Our team works together to create an individually tailored plan that integrates legal protections, tax efficiencies and investment portfolio optimization.
3. **Seamless Execution:** By managing the implementation of your plan internally, we eliminate gaps in communication and execution, ensuring a smoother process.
4. **Ongoing Monitoring:** Financial, tax and legal landscapes are ever-changing. We provide continuous oversight and adjustments to keep your plan aligned with your objectives.

The Benefits of Integration

- Efficiency: A single point of contact reduces redundancy and ensures that every professional involved is on the same page.
- Cost Savings: Proactive tax planning, financial planning and legal structuring often lead to significant financial savings over time.
- Peace of Mind: Knowing that your legal, tax, and wealth planning are managed cohesively allows you to focus on what matters most in your life.

Who Can Benefit?

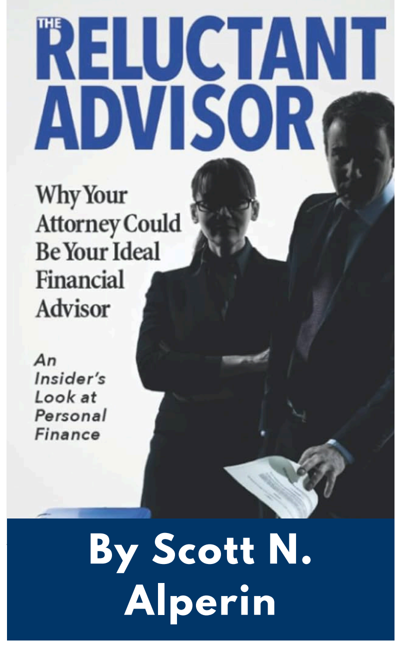
Our services are ideal for:

- Retirees or those planning for retirement.
- High-net-worth individuals and families.
- Business owners navigating succession and tax complexities.
- Anyone seeking a streamlined, professional approach to overall planning.
- Those who want to maximize their legacy.

What to Expect

As fiduciaries, we prioritize transparency and ethical standards. Our team's recommendations are always free from conflicts of interest and focused on your long-term goals. You'll have access to clear guidance on financial products and strategies, empowering you to make informed decisions with confidence.

Our Gift to You



Discover the story behind Alperin Law and Wealth and how our vision can benefit you. Scan below, call us at **757-530-7011** or e-mail us at **noah@alperinlaw.com** to **receive a free copy of our new book, The Reluctant Advisor: Why Your Attorney Could Be Your Ideal Financial Advisor**. This quick, insightful read will introduce you to our core philosophies and show you why our integrated advisory services are uniquely positioned to serve your best interests.

Ready to Learn More?

We'd love to show you how our innovative approach can benefit you and your loved ones. **Schedule Your Discovery Call Today** to explore how we can simplify and enhance your financial future.
Don't let gaps or misaligned advice hold you back. Let us help you take control with a trusted team that's always on the same page—yours. We would look forward to taking this journey with you!

Scan Me to Schedule Your Complimentary Integrated Planning Meeting and Request Your Free Book!