



## Eric A. Ess

### PARTNER

PRIVATE WEALTH CENTER, AZ

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### OVERVIEW

In his work with estate planning for high-net worth individuals and families, Eric focuses on clear and simple communication while offering thoughtful advice with a caring attitude.

Eric concentrates his practice on estate and tax planning, probate and trust administration, business succession planning and lifetime gift planning. Working closely with clients, Eric designs and implements estate plans that will accomplish their goals. He works to maximize available tax benefits and preserve family wealth for future generations, and he is attentive to considerations common to high-net-worth families, which are often unrelated to tax concerns.

Eric helps clients consider techniques to pass on their personal values to future generations, in addition to passing on their wealth.

### Industry

Financial Services & Capital Markets

### Services

Private Wealth

Business Succession Planning

## Experience

- Advising prominent high-net-worth individuals and families, entrepreneurs, entertainers and celebrities on wealth preservation, intra-family transfers and business succession planning.
- Maximizing income tax and wealth transfer tax efficiencies by developing creative plans that protect assets for future generations, including real property, financial assets, intellectual property and other business interests.
- Advising clients on planning for a liquidity event, such as the sale of a company or private equity transaction.
- Providing guidance on charitable giving arrangements (through both direct giving and the use of trusts) so as to maximize the income and transfer tax benefits of contributions.

## Recognition

- Bronze Medal Award, third highest score on the Certified Public Accountant (CPA) exam in the State of Missouri, 2003

## Education

- J.D., Saint Louis University School of Law
  - *magna cum laude*
  - Order of the Woolsack
  - *Saint Louis University Law Journal*, Editor
- Master of Accountancy, Truman State University
- B.S., Truman State University
  - Accounting
  - *summa cum laude*

## Admissions

- Arizona
- Missouri
- Illinois
- Texas

## Community Leadership

- EricsHouse, Treasurer and Board Member

EricsHouse is a non-profit organization dedicated to providing integrative grief care to people who have been impacted by alcohol, drugs or suicide loss.