The Legacy Discussion

Taking the time to plan for future generations.

Legacy planning is about more than wealth transfer. It consists of conversations on family values, long-term care needs, inheritance and philanthropy. Many of our clients are concerned about maintaining their lifestyle throughout their retirement years, becoming a burden to their loved ones and protecting their legacy. With taxes, inflation, medical costs, longevity and market fluctuations there is a lot to consider. Our team uses strategic risk and estate planning processes to create holistic financial plans that help our clients gain confidence so they are prepared for all of life's challenges.

What are your wishes for your children and grandchildren after you pass on?
Will your estate plan resolve or cause family conflicts? How would you like to be remembered?

WE CAN HELP

- Create a legacy for your family
- Navigate the maze of financial options
- Empower you to make informed decisions
- Provide education and valuable resources
- Help preserve assets and maintain liquidity
- Create a legacy for your favorite charity

SERVICES INCLUDE:

- Investments
- Asset Titling
- Wealth Transfer
- Charitable Gifting
- Long-Term Care Insurance
- Tax Reduction Strategies
- Healthcare Emergency Plan
- Digital Account Review
- Estate/Asset Protection Strategies
- Estate Planning Document Review
- Account Ownership & Beneficiary Review
- Risk Management & Insurance Analysis

Solid strategies for changing times®

www.IFPadvisor.com

Integrated FINANCIAL PARTNERS