Who Will Benefit from your Hard-Earned Assets? The IRS? A Charity? Your Family?

The Legacy Discussion

Taking the time to plan for future generations...

FSG

FINANCIAL STRATEGIES GROUP

THE LEGACY DISCUSSION

Helping you take control of your assets and direct their future course.

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:

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

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 can help our clients gain confidence so they are prepared for all of life's challenges. Some of the items to be discussed include:

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

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