



## TRANSFER OF WEALTH: LEAVE A LEGACY

### *The Importance of Wealth Transfer:*

You work hard to care for the people you love financially, it is important to continue that care, even after you die. You want to see your wishes for them come to fruition and create a lasting legacy for future generations.

Wealth transfer is fundamentally about transferring your assets to the people and organizations of your choosing when and how you'd like. You can build a strategy to continue your legacy.

It is never too early or late to explore wealth transfer.

### *Effective Wealth Transfer Strategy is an Ongoing Process:*

- Setting goals & objectives.

- **Assessing your current situation.**
- **Selecting strategies to transfer your wealth and reduce or eliminate unnecessary expenses, delay, publicity, taxes, risk, or other challenges.**
- **Determining income & liquidity needs for your beneficiaries.**
- **Executing your plan.**

[Full Details Here](#)

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