PFG ADVISORS
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PLANNING FOR "THE DAY AFTER"

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DO YOU KNOW WHO WILL HANDLE YOUR AFFAIRS AFTER YOU PASS AWAY?

Are they aware of their role? Are they qualified?
Do they know the first 3 things they should do?
Are they already stretched too thin with work and their own family?
Who would they seek for professional guidance that doesn't charge hourly?
What will be going on in their own life when this daunting task is thrust upon them?
Do you think it is a better idea for them to figure this out when you are gone or today?

These are questions nobody likes to think about, but preparing for "the day after" is crucial. We provide personalized, comprehensive services built on an understanding of your goals for a successful transfer of wealth and family values.

PLAN REVIEW & COMMUNICATION

How much does your family know about your plans?
Do they understand the rationale and intent behind your decisions?

Conveying at least some portion of your plan is in everyone's best interest, but family members can be notoriously anxious about doing so. They may be concerned about discussing it too soon or late, or giving too much or too little detail. We can help. We'll assist you with routine, recurring family meetings and customize the content to your desired level of detail, not to mention provide an objective viewpoint from years of experience.

ORGANIZATION

If you passed away tomorrow, would your family know what accounts exist and where to find them? Who handles the finances/bills in your house now and how quickly could they take over? Would the next generation be in a good position considering this would be all new to them?

In today's world requiring countless user names and passwords it's easy to become frustrated when trying to access your own accounts; can you imagine others trying to do so? From cable bills to old retirement plans, we see clients struggle to settle estates during what is already a difficult time. To mitigate this, a dedicated person on our team will work with you now, and in the future, to catalog and organize all of your accounts and assets, thereby simplifying the process for your family.

CONCIERGE SERVICE

You've reviewed your plan, educated your family, organized all of your assets - it may feel like your planning is complete, but the cycle is just getting started.

Your financial situation, family members, and the state of the world is constantly evolving and it's imperative that your plan does as well. Thoughout this cycle, we're committed to providing you with the highest level of client service while communicating unique ideas and opportunities to enhance your lifetime plan as well as your plan for the "day after."