

MULTI-GENERATIONAL PLANNING INSURANCE DISCUSSION PROMPTS



BUILDING A PLAN THAT NURTURES THE CONTINUANCE OF A FAMILY LEGACY CAN BE A DAUNTING

endeavor as families become more complex and fragmented over time. An intentional strategy creates a foundation for the long-term success of ultra-affluent families and can be the difference between squandered wealth and an enduring legacy.

Are you interested in preserving and growing your wealth for future generations?

Has your family's wealth been passed down through generations? Are you focused on preserving and growing it for those who come next?

Are you interested in diversifying your portfolio by incorporating life insurance as a potential asset class?



DON'T LEAVE YOUR LEGACY TO CHANCE

Contact us to review your plan, identify potential gaps, and design solutions to help preserve your legacy for generations to come.

HEIRMARK, LTD is independently owned and operated.

Securities and investment advisory services offered through M Holdings Securities, Inc. a registered Broker/Dealer and Investment Advisor, Member FINRA/SIPC.

HEIRMARK.COM



M Financial Group