

ESTATE EQUALIZATION INSURANCE DISCUSSION PROMPTS



FOR MANY PARENTS AND GRANDPARENTS, THE GOAL EXTENDS BEYOND TRANSFERRING WEALTH

It is preserving the relationships that matter most. Thoughtful wealth distribution can help provide each generation with a meaningful share of the family's legacy while establishing a framework designed to promote fairness, clarity, and harmony among family members.

Will your children take over your business when you retire? If so, will ownership be divided equally among them?

Do you have a child or family member with special needs who may require ongoing financial support?

Have you developed a strategy to balance business succession with your broader family legacy?



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.

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