

THE CONFIDENT *Legacy* VISION®

Your Vision

Estate planning is more than just wills and trusts. It starts with the question: "What do you want your legacy to be?" From there, we can help you transform your financial success to long-lasting personal significance. These are some of the factors we consider:

Values
Personal
Family
Spiritual
Community

Concerns & Goals
Family
Community
Health
Financial Security

Family
History and Dynamics
Needs
Talents

Assets
Composition
Liquidity
Ownership
Business Interests

Other
Laws
Taxes
Growth Rates
Flexibility
Simplicity

The Planning Vision Process®

Applying our unique seven-step process with our experience, collaboration, analysis, planning strategies, and creativity

The Confident *Legacy Vision*®

Your Family, Social, and Personal Legacy

Family Wealth
Appropriate financial
legacy for your heirs

Social Wealth
Philanthropic legacy
for your concerns

Personal Wealth
A legacy of your
personal values

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