

Improving Family Communication for Successful Wealth Transfer

Estate planning works to transfer the maximum amount of MONEY in the most tax efficient manner to beneficiaries. It is far less common for those plans to PREPARE THE FAMILY to constructively receive the wealth. Often, families have unique and complex circumstances that require thoughtful answers to challenging questions like:

- **What conversations are needed but not occurring?**
- **What are the non-financial outcomes we hope to see in our adult children's lives as a result of their inheritance?**
- **Our adult children have a history of instability, substance abuse and/or chronic mental illness; how can we leave our inheritance to them without hurting their futures?**
- **When it comes to leaving an inheritance to our children, is fair always equal?**
- **When and how do we communicate our estate plan to our children?**

The solution to helping families answer these questions is always the same: improving communication regarding inheritance.

We believe that almost every family can communicate more effectively about inheritance. We are committed to improving this crucial and often neglected aspect of traditional estate planning by preparing your client's family to receive their inheritances constructively. A successful wealth transition goes beyond the assets and includes the family's emotional, intellectual, spiritual and charitable capital. What would it mean to you if your clients had clarity about the non-financial outcomes of their estate plan?

Our proven process is built upon true collaboration, and we utilize a vetted network of credentialed specialists as needed. By helping parents address and resolve existing conflicts between one another and their adult children, we increase the chances of a successful wealth transition.

Independent Trustee Services • Family Meetings

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