LEARN | Start the Wealth Transfer Conversation

A primary objective for investors is to efficiently transfer their wealth to their heirs. Talk to your clients to help them achieve a tax-aware transfer of wealth.

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Did You Know?

$84.4 trillion in wealth is expected to be transferred from 2021 through 2045, and financial advisors are one of the top influencers of wealth transfer plans for affluent households.*

Key Takeaway

Your role is to facilitate estate planning conversations and work with clients' legal professionals to implement those desired legacy outcomes.

3 Questions to Ask Your Clients

Select each question to learn more about how it can guide this sensitive conversation.

Question

What are your primary objectives for the future of your wealth?

Question

Have you identified who will play important roles in your planning documents (executor, trustee, guardian, etc.) and discussed your plans with them?

Question

Do you have any concerns that should be factored into your estate plan?

Next Step

Partner with your clients' estate planning attorneys to help ensure that their estate plans minimize unrest and confusion among heirs.

KEEP LEARNING

Know the Core Estate Planning Documents

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Disclosure

*Cerulli Report—U.S. High-Net-Worth and Ultra-High-Net-Worth Markets 2021: Evolving Wealth Demographics. Cerulli Associates. 2022.

The Firm does not provide tax advice. The tax information contained herein is general and is not exhaustive by nature. Tax laws are complex and subject to change. Investors should always consult their own legal or tax professional for information concerning their individual situation.

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