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# LEARN | Start the Wealth Transfer Conversation

3 minutes

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

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