Legacy plans should focus on the here and now – how you have structured your life to demonstrate your values. That’s why we encourage you to take steps today to help preserve what matters most. Explore a spectrum of strategies available to help you organize your efforts as you live out your family legacy.

**FOUNDATIONAL**

- Will
- Durable power of attorney
- Healthcare proxy
- Advance directive
- Titling of assets
- Appointing a guardian for a minor
- Life insurance
- Emergency fund
- Irrevocable trust
- Ethical will or family love letter
- Letter of intention
- College savings options

**ADDITIONAL**

- Other types of trusts
- Autobiography
- Video will
- Custom wealth transfer strategies

**BUILD YOUR LEGACY YOUR WAY.**

We can help you create the future you’ve envisioned. Connect with us to learn more.