

Guiding you toward your goals

The Transition Dilemma – Fair distribution of assets



70
Years Old

Business Owner
Second Marriage

\$10 Million Net
Worth

VISION

Defining Your Vision

- Current Estate plan was not adequately set up to share assets with all beneficiaries
- Client was not confident that his assets would be sufficiently managed after they were distributed to adult children in future

STRATEGY

Creating The Strategy

- To review and redraft Will
- Restructure the Family Trust to account for blended family structure that include mechanism within trust to protect principal assets, while providing income to adult children
- Estate Planning using insurance strategy to help pass along the family business to the next generation and continue legacy*
- Consolidate funds from other accounts to help simplify the management of assets, ensure appropriate risk and reduce fees

IMPLEMENTATION

Implementing The Solutions

- Protection of assets in place and set up for equitable distribution to beneficiaries
- Created support Mechanisms to ensure longevity of support for his children
- Determined Tax Efficiency and improved savings
- Family will be financially supported in the way that was intended and assets were sufficiently protected for years ahead



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