

Planning Checklist: Multigenerational Engagement

Establish your goals and priorities to make sure your plan is in place to help you achieve your vision of the future.

- Identify your legacy planning goals including family, charitable organizations, etc.
- Document your goals and intentions for inheritances. Decide who will inherit and how the money will be used.
- Explore using a trust to help protect and manage assets for current and/or future generations in your family
- Consult your Financial Advisor, Estate Attorney and CPA to coordinate planning
- Create strategies for reducing taxes
- Identify strategies to educate/instill responsible stewardship of wealth in the next generation
- Think through how and when you want to engage your family in telling them your plans

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