

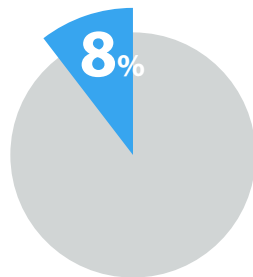
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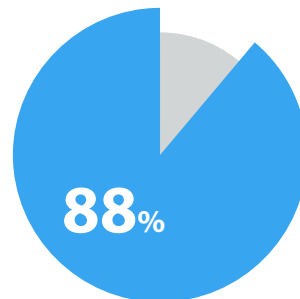
Careful Planning for loved one's **financial future** may be more complex than you realize. And when money meets emotion, even the best intentions may lead to unintended consequences. Though end of life is inevitable, many families avoid talking about it. Yet, **frank conversations are essential to ensuring your wishes are met.**

Complete key documents, including current will, power of attorney, and/or health care directive. **Make sure those documents are stored in secure but easily accessible locations.** Exploring how strategic use of trust might help you achieve your goals.

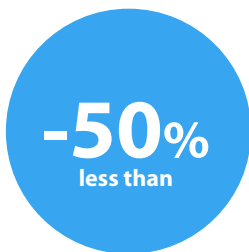
STATISTICS



Have completed the necessary documents



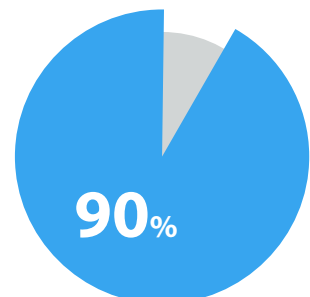
Clients who believe they have successfully prepared for the financial future of their families



Americans lacking of basic will



Estimated wealth baby boomers will transfers in the next 25 years



High-net-worth households that give to Charity