



Legacy Planning: Handing Down Values as Well as Wealth

How can you help your heirs sustain what you've created?

Your wealth has meaning. It should be conveyed to your heirs or your favorite causes in a way that expresses your values. Through legacy planning, that objective can be realized.

Legacy planning encompasses more than the transfer of assets. It is about how you want to be remembered by your heirs, your colleagues, and your community. It concerns the positive effect your wealth can have on future generations—and the world.

Multiple generations should work on a legacy plan. Involving your children and grandchildren strengthens the commitment.

What goes into a legacy plan? Besides estate planning basics, it can include an ethical will, in which you explain your beliefs and give life lessons to your heirs. It can provide instructions for the preservation of family history documents and digital assets. It may integrate a family business succession plan, an education fund, or a foundation to gift charities and other non-profit groups.

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