

MULTIGENERATIONAL WEALTH TRANSFER



A thoughtfully structured estate plan can achieve much more than minimizing estate and gift taxes. It secures your legacy by offering you and future generations:

INTENTION

Provides clear direction to see that assets are distributed to your heirs and used as you expect and intend



HARMONY

Promotes harmony among your beneficiaries by helping minimize potential conflicts



CONTINGENCY

Establishes a plan for managing your assets in the event you become unable or unwilling to manage your own affairs



PROTECTION

Protects your assets from the potential negative financial impact of divorce and creditors



DIRECTION

Documents your wishes and preferences regarding medical care and other non-financial topics



Contact your HT|TC advisor regarding our estate plan review service.
Put our team's estate planning knowledge and perspective to work for you today.

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