

Start Your Estate Plan

Your Estate Plan: The Cornerstone of a Lasting Legacy

With wealth can come many meaningful and complex choices about the future of your money. Who will benefit from the assets you've accumulated? What will your legacy be? How much is needed to help future generations achieve their dreams? Whatever the future holds, you want to feel confident that your wealth will leave a lasting legacy.

The Importance of Estate Planning

The estate planning process is designed to:

1. Manage and protect your assets during your life
2. Preserve and guide the distribution of assets after your death according to your goals and wishes

What does estate planning mean to you specifically? That depends on who you are. Age, wealth, health, lifestyle choices, goals and countless other factors determine your particular estate planning needs. For wealthy individuals, families and business owners, sophisticated estate planning techniques can help protect your legacy and minimize the potential estate tax impact.



What Do You Hope to Accomplish Through Your Estate Plan?

A clear understanding of your goals and preferences is central to developing a successful estate plan. A comprehensive plan takes into account more than just your specific circumstances and the various factors that may impact your estate; your feelings and wishes are just as important. Here are some potential goals to consider when beginning the estate planning process:

- Provide financial security for your family
- Ensure your assets and property are preserved and passed on to your intended beneficiaries
- Avoid disputes among family members, business partners or with third parties
- Protect assets from potential creditors, divorce or irresponsible beneficiaries

- Transfer ownership of your business to your beneficiaries
- Transfer assets to family members during your lifetime
- Provide for the education of your children or grandchildren
- Leave a personal legacy to your favorite charitable cause
- Choose an agent to assist with financial transactions and medical decisions if you're living but incapacitated
- Provide adequate liquidity to settle your estate
- Minimize future gift, state and generation-skipping taxes

Helping You Develop the Right Plan

Whatever your estate planning goals, HFG Wealth Management can help develop a thorough and thoughtful plan that is personalized to your needs. We'll work in concert with your legal, tax and accounting advisors to develop an estate planning solution that fulfills your wishes for yourself, your loved ones and the world around you. To get started on your estate plan, contact us today for a complimentary consultation.

[Watch Our Free Webinar for an overview of Estate Planning Strategies that may be suitable for you.](#)

