

LEGACY WEALTH PLANNING

Researchers estimate that trillions of dollars in financial and non-financial assets will be passed down from Baby Boomers to Generation X and Millennials over the next three decades. Are you and your heirs prepared?

At The Ezzell-Conklin Group, we understand that wealth transfer involves more than your assets, preservation of your family's values as your wealth transitions to the next generation is equally as important.

SERVICES & AREAS OF FOCUS



WEALTH TRANSFER STRATEGIES

Estate planning, tax minimization, philanthropic planning, establishment/management of trusts and foundations, and values-based financial planning



FAMILY GOVERNANCE

Development of family mission statement and facilitation of family meetings



NEXT GENERATION EDUCATION

Custom family education plans focused on enhancing understanding of core portfolio, long-term goals, investing best practices and/or trustee and beneficiary responsibilities



MULTI-GENERATIONAL WEALTH PLANNING

You have spent a lifetime building a strong foundation for your family; imagine if you were able to pass not only your material wealth, but also the values and wealth building skills that you have learned and lived

From business transfer to personal wealth, The Ezzell-Conklin Group offers you and your family specialized, consultative wealth transfer, estate planning and long-term financial planning services to help you preserve your legacy.





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