

PREPARING THE NEXT GENERATION

Helping Your Children Help You.

The steps you take today can give your children clarity, confidence, and peace of mind tomorrow.



4 QUESTIONS EVERY PARENT SHOULD ANSWER

1



WOULD THEY KNOW WHO TO CALL?

Advisor, attorney,
CPA, insurance contacts,
doctors, and other
key professionals.

2



WOULD THEY KNOW WHERE EVERYTHING IS?

Accounts, insurance
policies, estate
documents, property
information, and
digital access.

3



WOULD THEY HAVE THE AUTHORITY TO HELP?

Power of attorney,
health care proxy,
beneficiaries, trusts,
and estate documents.

4



WOULD THEY KNOW WHAT YOU WANT?

Care preferences,
financial priorities,
legacy wishes, sentimental
items, and personal
instructions.



LEAVE A PERSONAL LETTER

Share your values, care wishes,
legacy goals, and even
sentimental items.

A personal letter adds a
human touch to legal
documents and can be one
of the greatest gifts you
leave behind.

HOW WE CAN HELP



We can introduce you and your family to a team of professionals, estate attorneys, elder care experts, and tax advisors so you have a trusted team when the time comes.



We'll document a step-by-step continuity plan for your children to follow if they need to take over your financial affairs.



With your permission, we can educate your children on your financial setup so they're comfortable stepping in when needed.



As your trusted financial advisors, we help you plan for today—so your children are prepared for tomorrow.