



Estate /Legacy Planning Strategies

An assessment of your estate will help address important questions giving you an opportunity to plan for estate taxes and administrative expenses at death.

- Education
 - 4 types of assets
 - 5 ways to pass assets
 - 6 estate settlement costs
 - Understanding a living trust
- Document review
 - We will review trusts, wills, buy-sell agreements and other complex advanced planning materials
- Family Estate Planning (verifying what you have goes where you want it to)
 - Current wills, Power of Attorney & Living Will Documents
 - Proper beneficiaries – all IRAS', 401k, Life insurance, & annuities
 - Investment and bank accounts titled correctly – Transfer on Death (TOD) & Payable on Death (POD)
 - Discussion of Living Trust
- High Net worth Estate Planning
 - Estate analysis – your settlement costs
 - Potential strategies to reduce settlement costs
- Settling Estates
 - We assist in dispersing & settling estates
 - Work hand in hand with attorney, accountant, trust officer & family
 - Process death claims for the accounts we are the agent on file and also assist in making conference calls with other companies we are not the agent of record on.

First Wealth Financial Group and LPL Financial do not provide legal and/or tax advice or services. Please consult your legal and/or tax advisor regarding your specific situation.

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