WEALTH TRANSFER PLANNING

Wealth transfer typically occurs after your lifetime. Working on wealth transfer now, however, can provide a number of advantages for you—and the next generation. At Corient, we want to help you experience the joy, confidence and satisfaction of transferring your wealth to your beneficiaries now. Integrating our wealth transfer planning with our wealth management services could help you more fully enjoy your wealth, your life and your family.

Experience Joy

Observe, understand and enjoy the impact your wealth will have on your family and favorite organizations.

Ease Family Stress

Mitigate family conflict and reduce the mental costs of estate administration by establishing expectations about values and inheritance today.

Gain Peace of Mind

Relax, knowing that your family is protected and that your wealth will be employed and managed in accordance with your values and objectives.

Manage Taxes

Take advantage of management structures designed to help minimize taxes on existing wealth and growth.

CORIENT

A Proactive Approach

As an extension of our core wealth management services, we believe wealth transfer planning is a continuous process. We utilize a proactive, goals-based approach to create a wealth transfer plan for intergenerational wealth:

1. **Work closely with clients** to understand family dynamics and to define family goals and objectives around their wealth.
2. **Gather and review appropriate data** including balance sheets, existing trusts and estate plans, and current financial statements.
3. **Analyze how to best utilize existing trusts and new strategies** to best achieve client goals and objectives, then provide recommendations—and understandable education—to assist the client in choosing an appropriate strategy.
4. **Lead the implementation of the plan** and assignment of responsibilities and accountable parties.
5. **Continue to review the plan** in coordination with client goals, taking into account changes in financial position, laws, strategies, family dynamics and recommend any necessary adjustments.

For more information on how we can help you create a wealth transfer plan, please contact your Corient Wealth Advisor.