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Inheritance Protection Plans

An inheritance should be more than a windfall, a one-time moment of financial good fortune. Most people would prefer to provide their heirs with a long-term source of financial support, a real financial legacy. Such a result is possible with thoughtful trust planning.

Perhaps a child has made a poor marriage. Assets that the child inherits outright could be vulnerable in case of a future divorce. A trust provides protection.

Perhaps a child has made some poor business dealings. The child may be personally liable for the business' debts. A trust could avoid such a result.

Perhaps a child just never learned how to manage investments. A trust comes with professional asset management built in.

Profile

- Affluent couple with grown children, minor grandchildren.
- Concerned about the potential for wasting inherited assets upon divorce.
- Estimated investable assets of \$700,000.
- Would prefer inheritance to be a lasting financial resource.

How we can help

- As trustee, we can assume some or all responsibility for investment management.
- Assets can be protected from the creditors of the beneficiaries.
- Trust assets may last until grandchildren reach adulthood or even later.

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