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Lifetime financial care

Our premier service is the revocable living trust. There are many good reasons to set up a trust during one’s lifetime, including probate avoidance, financial privacy, and professional portfolio management. But the best reason, we’ve always felt, is that it provides continuous financial protection should the grantor become ill or incapacitated. This can be especially valuable for older couples, especially when one of them lacks investment expertise.

Profile

- Affluent, elderly couple, married 50+ years
- Estimated family investable assets: \$500,000
- Wife knows little about investing; Husband is a talented amateur
- Concerns: lifetime financial protection for the surviving spouse
- Inheritance for children and grandchildren

How we can simplify this couple’s financial life

- Provide financial management in case of illness or incapacity
- Support the surviving spouse in his or her accustomed standard of living
- Preserve their carefully accumulated wealth to enjoy for many generations to come

Your transition question to make the referral

“Have you considered who will manage your finances in case of an extended medical problem for either of you?”

We will explain the benefits of living trusts to your customer.

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Not Bank Deposits or Obligations	May Lose Value