



MAKE FINANCIAL PLANNING **A FAMILY MATTER**

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CONSIDER THE STATS...

70%

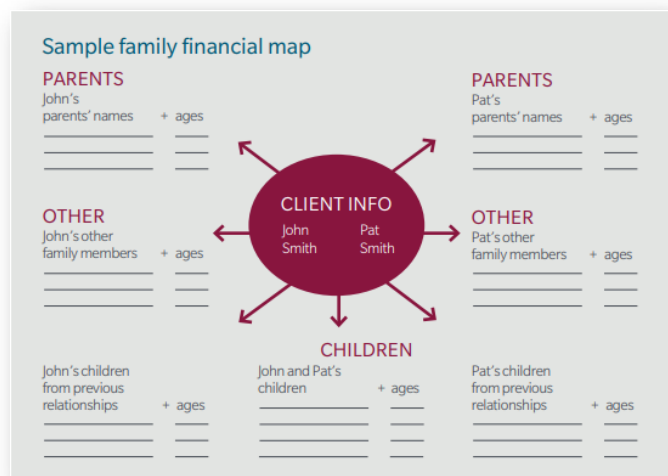
of wealthy families lose a majority of their wealth before the end of the second generation...

90%

tend to lose it all before the end of the third generation...

WHY ARE WEALTH TRANSFERS FAILING?

- *Not having a plan*
- *Not sharing the plan*
- *Not updating the plan*
- *Not being specific in the plan*
- *Not preparing beneficiaries*



THINK ABOUT YOUR FAMILY AND ESTATE PLANNING AND ANSWER THESE QUESTIONS:

- *Do you or your parents have a will and/or trust and do you or your children know where it is?* Circle one: **Yes/No**
- *Do you or your parents have a medical power of attorney?* Circle one: **Yes/No**
- *Do you or your adult children know what the medical directives are in this power of attorney and why?* Circle one: **Yes/No**

Create a short list of family treasures: jewelry, antiques, art, keepsakes, etc:

_____	_____
_____	_____
_____	_____

- *Would you or siblings have the same items on their list?* Circle one: **Yes/No**
- *Would that create tension after the passing of the second parent?* Circle one: **Yes/No**
- *Would it be better and less stressful to have properly resolved these key questions as part of the family estate plan in advance of the last parent passing?* Circle one: **Yes/No**

MAKE FINANCIAL PLANNING A FAMILY MATTER BY SHARING:

25 DOCUMENTS YOU NEED NOW CHECKLIST

REFERRING CANDIDATES TO SPEAK WITH WEALTH MANAGEMENT PROFESSIONAL

MOST LIKELY PROSPECTS:

In your client encounters, the opportunity may present itself for you to introduce this subject for their benefit and recommend they meet with a member of the investment services team. Be on alert if clients mention any of the following clues that include, but are not limited to:

- *Those mentioning grandchildren or the birth of a new grandchild*
- *Those who have remarried and/or have a blended family*
- *Those who may have been recently diagnosed with long-term ailments*
- *Those mentioning vacation homes or the purchase of new property*

PLEASE LIST THE NAMES OF 5 CLIENTS THAT COULD BENEFIT FROM THIS PROGRAM:

Name	Phone #
1) _____	_____
2) _____	_____
3) _____	_____
4) _____	_____
5) _____	_____