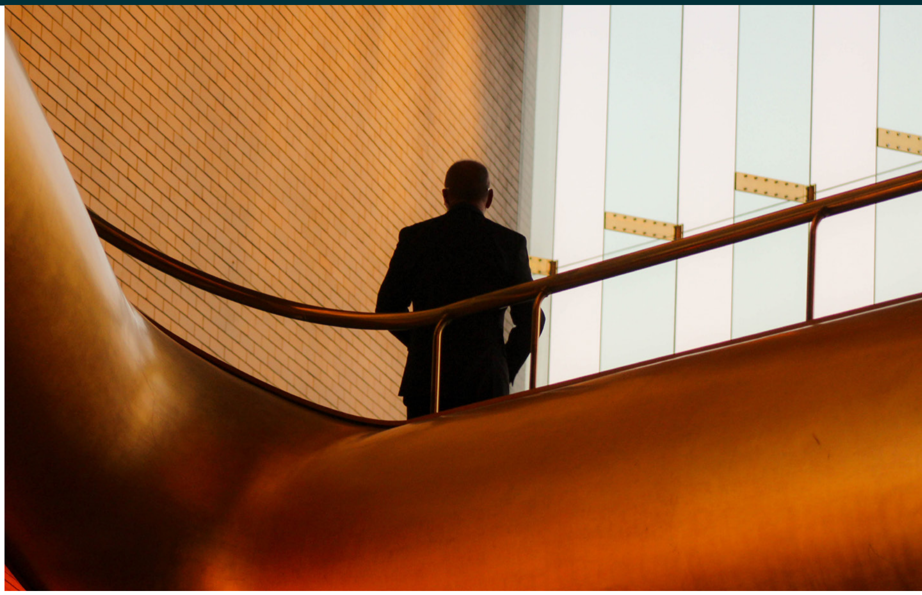
Legacy Trust

Wealth Planning

In matters of wealth, details matter. Our approach is consistent and proven; and our firm is steadfastly independent, ensuring you never get offered a product or service that's not in your best interest.



CASH FLOW

- Capital needs analysis
- Liquidity (emergency fund)
- Large lump sum strategies
- Debt management

CHARITABLE GIVING

- Donor advised fund
- Private foundation
- Charitable remainder trust & charitable lead trust
- Matching gifts, charitable gift annuity & qualified charitable distributions

EDUCATION

- Needs analysis & savings vehicles
- Gift & income tax strategies
- Financial aid
- Sources of financing (loans)

INVESTMENT

- Executive compensation
- Portfolio development & analysis
- Asset allocation & diversification
- Risk management & return management

RISK MANAGEMENT & INSURANCE

- Life insurance needs
- Liability coverage
- Disability income
- Long-term care policy types

ESTATE MANAGEMENT

- Gifting strategies & beneficiary designations
- Estate tax liability
- Asset protection
- Aging, eldercare & special needs
- Business succession

RETIREMENT ACCUMULATION & DISTRIBUTION

- Social Security & Medicare
- Retiement types & needs analysis
- Qualified plan rules & options
- Plan selection for businesses

TAX MANAGEMENT

- Passive activity & at-risk rules
- Reduction & management techniques
- Document types
- Current, deferred & future liabilities

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