

Estate planning and legacy giving



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As an important component of a financial roadmap, estate planning serves to reduce uncertainties and tough decisions that can come with major life events. This special feature will explore how putting a plan in place can help to avoid potential long-lasting and costly impacts that can accompany the process of settling your affairs. It will also highlight the expert advice and tools that have been found useful for guiding these challenging discussions.

Proposed topic highlights:

- PLANNING AND ADVICE** – The role of expert advice in navigating wealth transfer challenges.
- LEGACY GIVING** – Achieving an impact through philanthropy.
- LIFE INSURANCE** – Life insurance as an estate-planning tool.
- WILLS** – Reducing the risks of undesired asset allocation.
- TECHNOLOGY** – Technology tools for the estate planning process.

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