

CREATING YOUR FAMILY LEGACY

Legacy plans should focus on the here and now – how you have structured your life to demonstrate your values. That’s why we encourage you to take steps today to help preserve what matters most. Explore a spectrum of strategies available to help you organise your efforts as you live out your family legacy.

> FOUNDATIONAL



- Will
- Durable power of attorney
- Estate planning
- Advance directive
- Titling of assets

Appointing a guardian for a minor

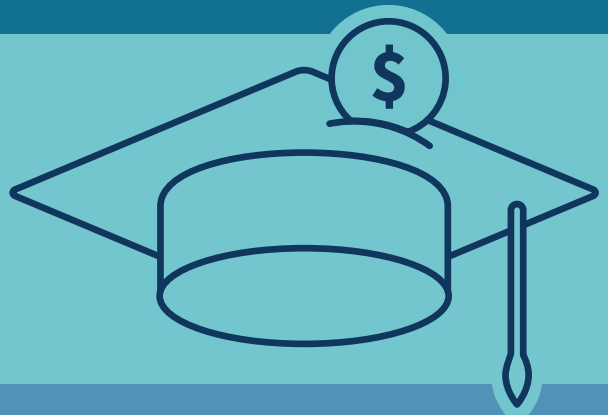
Life insurance

Emergency fund

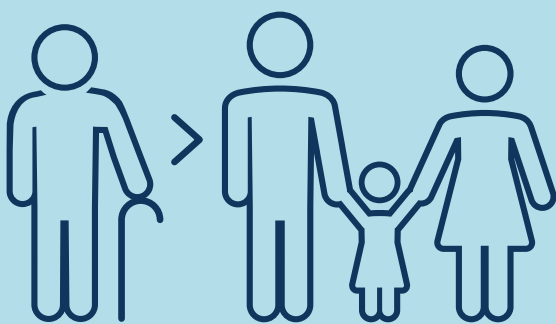


- Irrevocable trust
- Ethical will or family love letter
- Letter of intention

Academic investment savings options



> ADDITIONAL



- Other types of trusts
- Autobiography
- Video will
- Custom wealth transfer strategies

BUILD YOUR LEGACY YOUR WAY.

We can help you create the future you’ve envisioned.
Connect with us to learn more.

RAYMOND JAMES