

# IS A TRUST RIGHT FOR YOUR FAMILY

For families with significant wealth, estate planning is about more than passing along assets—it's about protecting your legacy, caring for the people you love, and creating clarity for future generations. While many households rely solely on a will, high-net-worth families often benefit from a more comprehensive approach. A trust can be one of the most effective tools to accomplish that goal.

## Key Reasons Clients Choose to Incorporate a Trust Into Their Financial Plan

- **Greater Control Over Your Legacy**  
A trust allows you to specify exactly how and when assets are distributed—whether for education, healthcare, business opportunities, or long-term family support.
- **Avoid Probate**  
Assets held in a trust typically bypass probate, helping your family avoid unnecessary delays, legal expenses, and administrative burdens.
- **Enhanced Privacy**  
Unlike a will, a trust remains private. For affluent families, this added confidentiality can be invaluable.
- **Reduced Family Conflict**  
Clear instructions and a structured plan help prevent misunderstandings and disputes among heirs during an already emotional time.
- **Protection for Beneficiaries**  
Trusts can shield inherited assets from creditors, lawsuits, divorce, or poor financial decisions—helping preserve wealth for future generations.
- **Planning for Incapacity**  
A living trust provides a built-in plan for managing your finances if you ever become unable to do so, without the need for court involvement.
- **True Multigenerational Planning**  
For Families with estates of \$10M+, a trust helps ensure that wealth is sustained, protected, and aligned with your long-term family values.

### The Bottom Line

A thoughtfully designed trust is more than a legal document—it's a strategic tool that brings organization, protection, and peace of mind to your family's financial future.

If you are interested in learning more about your current estate plan, we're happy to review it alongside your estate attorney and help determine whether a trust may be the right next step.

As always, our goal is to help you build a legacy that lasts.



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