

Wealth Transfer Video Transcript

Did you know that eighty four trillion is expected to be transferred from baby boomers to gen x and millennials? But the great wealth transfer as it's known can be about more than just passing down money. This generational shift gives families the chance to create lasting memories and build stronger bonds. Here are a few approaches you can take now. Consider multiple savings accounts. Allocate funds for specific purposes like education, home ownership, or philanthropy.

Think about giving while living. This lets you see the impact your gifts can have on loved ones. Now, finally, invest in multi generational travel. Create shared experiences that bring your family closer together, and pass on more than just money. You can pass on memories and values.

The great wealth transfer gives our loved ones the chance to pass on their legacy and shape the future of their families.