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Building a Values-Based, Multi-Generation Estate Plan 1. Create a family mission statement. A family mission statement explains what you value and hope to pass on to the next... 2. Encourage actions that align with family values. Your estate plan can help encourage behaviors in future generations... ..

Building a Values-Based Multi-Generational Estate Plan

Value based estate planning – can take two distinct forms depending on the circumstances. Some people want the values they live by – or sometimes the values they wish they had lived by – to be continued after they have gone. This can mean the setting up of charitable foundations at one extreme, to taking

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THE SEVEN PRINCIPLES OF VALUES-BASED ESTATE PLANNING. Eternal Planning: Why Clients Are Trapped. Eternal Planning: Why Advisors Are Trapped. Principle #1: Understand the Hierarchy of Planning Objectives. Principle #2: Master the Concept of Social Capital. Principle #3: Define the Family Financial Philosophy.

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representative of Thompson & Associates SM, Joe helps nonprofits strengthen their relationships with their supporters through a personalized estate planning process. We give individuals and families an opportunity to clarify their values and reduce uncertainty, freeing them to make a lasting difference for their families, their communities, and the world.

Values-Based Estate Planning -
GeneroworksGeneroworks

Values-Based Estate Planning. Estate planning consists of more procrastination, indecision, and inertia associated than any other area of planning. Affluent baby boomers, in particular, as the beneficiaries of the largest intergenerational transfer of wealth in history, have a daunting set of financial concerns with which to contend.

Abacus Planning Group | Values-Based Estate Planning

Values-based estate planning begins with your values, helps you articulate your priorities, outlines your desired end results and protects your assets, freeing you to make a lasting difference for your family, community, and favorite charities.

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We give individuals and families an opportunity to clarify their values and reduce uncertainty, freeing them to make a lasting impact on their family, community and the world. Through our personalized estate planning approach, we help nonprofits strengthen their relationships with supporters. We give individuals and families an opportunity to clarify their values and reduce uncertainty, freeing them to make a lasting impact on their family, community and the world.

Thompson & Associates | Values-based Estate Planning

Many estate planners fail to adequately

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understand a client's personal values and priorities and merely plug into a standardized will and trust setup. This book provides a systematic method for analyzing and implementing needs for personal financial security, gifts to family, and charitable giving.

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Values-based estate planning is a personalized process to develop an estate plan that highlights your values, captures your priorities, outlines your intentions and protects your assets. As a service to our friends and donors, St. Charles Foundation offers confidential and comprehensive estate planning services at no charge and with no obligation.

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