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National Planning Institute

Family Legacy Pyramid

Will you be able to give back to the the community or other charitable groups?

Charitable Desires

- Civic
- Religious
- Community groups
- Asset selectionInvestments
- Insurance
- Property
- Charitable strategies: Private Foundation, Donor Advised Funds, Charitable Trusts, etc.

Once you are "OK," what does it mean for your family to be "OK?"

Asset Protection

- Revocable & irrevocable trust analysis
- Beneficiary alignment
- College funding

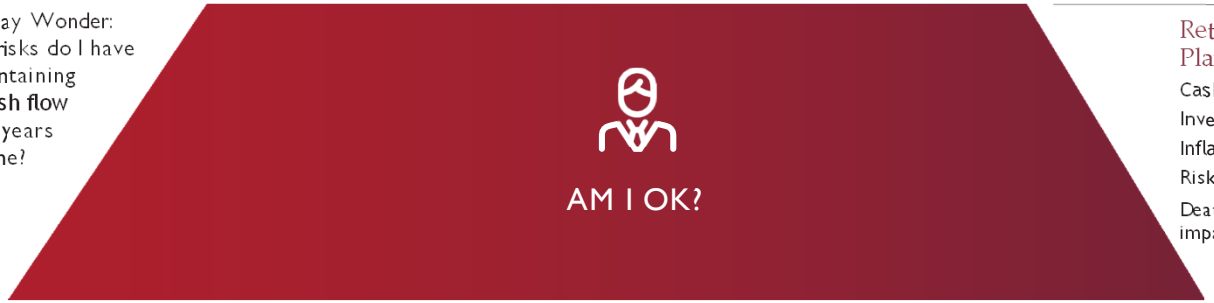
Estate Planning

- °Divorce, liability, & creditor
- Distribution provisions
- Multi-generational
- Dynasty concerns
- Generation skipping
- Estate settlement costs

Business Planning

- Succession to family members
- Exit planning to non-family owners
- Key executive planning
- Qualified & non-qualified plan analysis
- Transfer planning

You may Wonder: What risks do I have in maintaining my cash flow in the years to come?



Retirement Planning

- Cash flow analysis
- Investment ROR
- Inflation impact
- Risk tolerance
- Death & disability impact

Estate Planning

- Probate exposure
- Distribution provisions
- Beneficiary concerns
- Ancillary documents
- Estate settlement costs

Other Planning

- Divorce, liability, & creditor issues
- Long-term care
- Tax reduction
- Property & casualty coverage

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