Estate Planning

Passing wealth through generations

State and federal estate taxes can significantly erode a family's wealth over time—much more so than income taxes. A properly designed estate plan helps mitigate this risk, especially for individuals residing in high-tax states such as California, New York and New Jersey.

Equally as important, estate planning helps ensure:

- Your wealth passes to future generations in the most protective and efficient manner.
- Beneficiaries with special needs are cared for.
- Charitable gifts are made according to your intentions.

Customized, Adaptable Estate Plans

At Cerity Partners, our specialists have extensive knowledge of state and federal estate, tax and trust laws. They'll work with you and your attorney to design and implement a comprehensive plan to pursue your goals and preserve your wealth. Here's a small sample of the support you'll receive:

Wealth protection and transfer strategies

Charitable planning and gift coordination

Review of wills, trusts and other estate-planning documents

Coordination of estate plan with life insurance coverage

Review of beneficiaries and titling of assets

Ongoing updates to reflect changing laws and family circumstances

Experience a *better* approach to financial service.

All the experts. One point of contact. Comprehensive financial advice, tailored to you.

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