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Will the Asset Intentions of Your Loved Ones Be Achieved?

Timely interaction with their financial professional helps build beneficial connections

Financial discussions are private things. Your spouse or parents may have discussed plans for their assets upon their passing with their financial professional. But they may not have shared this. So ask yourself ...

- ***How well do I know my spouse's or parents' financial professional?***
- ***How well do they know me?***
- ***Have I engaged with them about my family's asset intentions?***

Know the Facts that May Impact Your Family

Heirs who don't know the financial professional well often then turn elsewhere. The statistics are surprising ...

Spouses

About **80%** of widows leave the financial professional after a spouse's death.[1]

Children

More than **70%** of heirs are likely to change financial advisers after inheriting.[2]

This may mean a wealth of information about an asset owner's interests and intentions gets ***lost in the shuffle***.

Make a Connection and Grow a Relationship

Matters of financial importance often **connect generations**. So timely and meaningful communication is key. Empower all parties to freely share their perspective. Strive to build trust and confidence and gain a mutual understanding of intentions. Then look to widen the conversation over time. Seek to create connections with your loved one's financial professional *now* to help improve the likelihood intentions are met *later*.

Get More Information to Start the Conversation

Contact the financial professional or visit our site for resources on meaningful multi-generational interaction on shared financial matters.

Ask for a special guide to help define assets and intentions

1 Kiplinger, "Widows Move Forward on Their Own – But Not Alone," June 2, 2021.
2 Cerulli Associates, "Aging Boomers Bring Intergenerational Planning to the Forefront," July 19, 2021.

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