LEGACY PLANNING

Oftentimes the greatest gift your clients can give to future generations is their legacy. Their stories, memories, and values.

Families realize the inherent benefits of preparing heirs to be responsible stewards of wealth. By sharing life lessons and life experiences that have had significant impact on their actions and decisions, your clients are able to celebrate their family history and transfer wealth in a way that enriches the lives of their family members and allows their heirs to flourish.

At Cumberland Trust, we believe that legacy involves more than valuables. It includes values, traditions, and beliefs. As such, we consider it a great responsibility to ensure that the legacy your clients leave is the one they intended.

Through open, ongoing discussions with your clients and their children about wealth, you are able to build a relationship with the heirs and prepare them for the responsibility and challenges associated with inheriting wealth. We partner with financial advisors, family attorneys, and CPAs to facilitate family discussions. We help them articulate the family values underlying the accumulation of wealth and prepare heirs to be good stewards and thoughtful administrators of that wealth.

To learn more about Cumberland Trust's unique platform, visit cumberlandtrust.com.

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