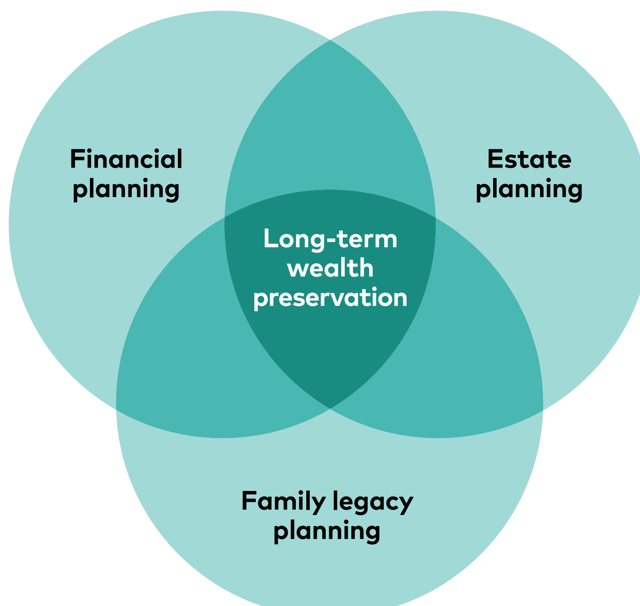
Family legacy planning: Prepare your loved ones for future wealth transfer

Your legacy reflects who you are, what you care about, and how you want to be remembered. Carrying it forward is a significant responsibility that often involves complex and challenging conversations. Vanguard Family Legacy Services helps families navigate these discussions, ensuring everyone understands and is aligned on a clear, comprehensive plan.

The wealth preservation trifecta

Wealth preservation demands a holistic approach involving three key areas—financial planning, estate planning, and **family legacy planning**. While the technical aspects of financial and estate planning are essential, your legacy could waver if your loved ones are underprepared.

Family legacy planning supports how a family communicates, educates beneficiaries, and prepares them for future roles and responsibilities.



How we help empower your legacy

Our family legacy specialists provide a range of resources to help you plan and strategize effectively:

- **Communication and facilitation support.** Create a safe space for conversation, equipping you and your loved ones with the tools needed to establish a consistent communication plan and collaboration framework to ensure your legacy endures across generations.
- **Legacy preparedness.** Assist individuals, couples, and others in defining a vision for the future and evaluating their readiness to carry out your family's goals.
- **Beneficiary preparation.** Help family members understand and prepare for their future roles and responsibilities.
- **Investor education.** Provide foundational investment and wealth management principles to empower beneficiaries to make informed and confident financial decisions.

When it comes to your legacy, the stakes are high

Family legacy planning can help ensure your wealth and values are preserved and upheld by future generations.

Call 844-634-2461 or schedule an appointment to speak with your relationship manager or advisor.

Scan the QR code below to learn more.

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