

## Wealth Studios

# Benefits Of A Comprehensive Financial Plan

A comprehensive Financial Plan can help you feel more confident about the future, knowing your loved ones will be taken care of and that the legacy you leave behind is the one you want. Plus, thoughtful planning today can help minimize taxes and probate fees, and ensure a smooth transfer of wealth.

Wealth Studios is designed to help financial professionals focus on your goals to create a customized plan. It's easy to use, allows you and your advisor to make changes to your plan and immediately see the impact.

### Income Studio

Dynamically, view your cash-flow including yearly income sources, including all interest and dividends from assets. Plus, you can see how your expenses can be funded and if a surplus or deficit is likely to exist at the end of a 12-month period.

### Potential Benefits:

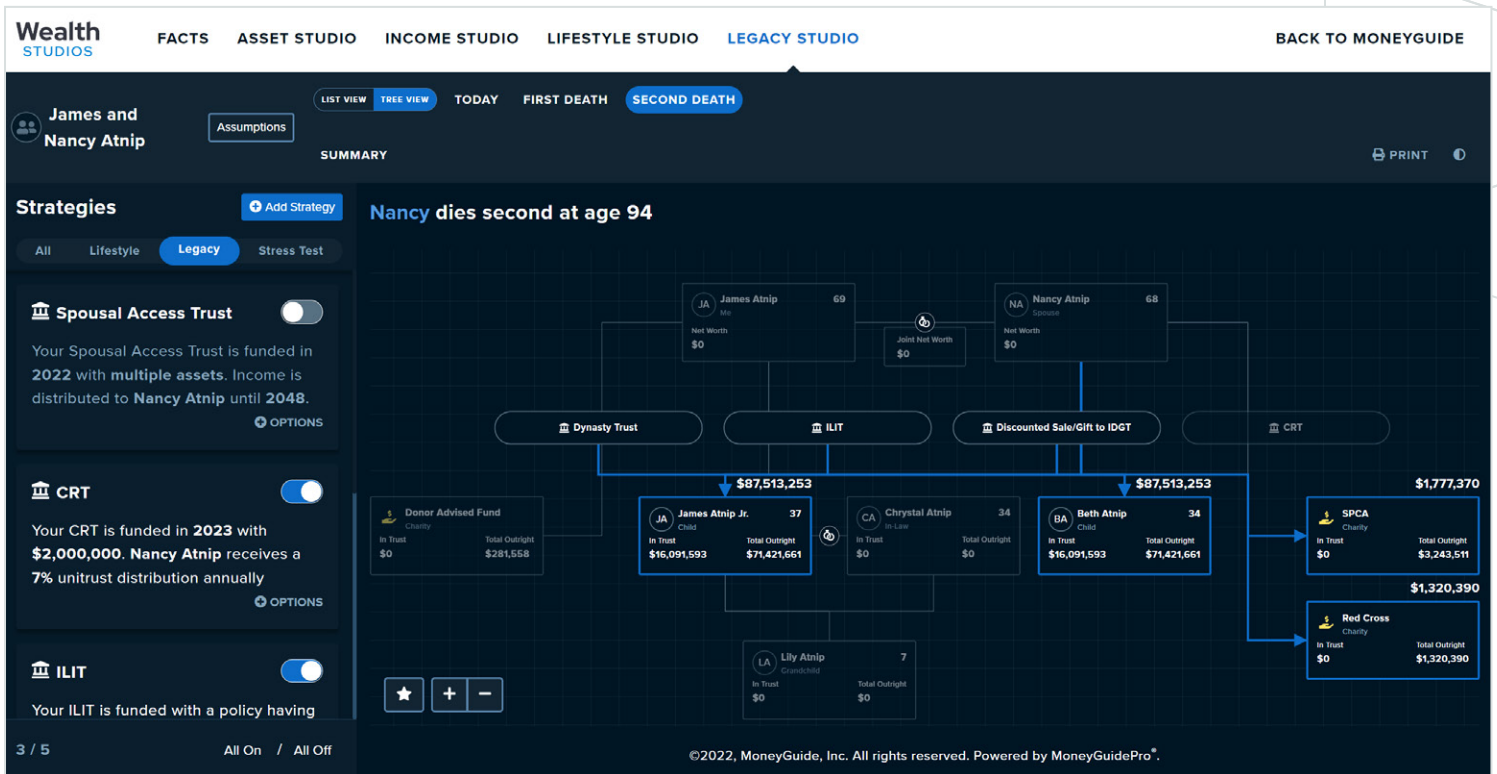
- Ensure smooth transfer of wealth
- Control and flexibility
- Avoid family strife
- Provide peace of mind
- Planning for the unexpected
- Privacy
- Protection
- Avoid probate
- Tax liability management



### Lifestyle Studio

This interactive experience allows you to co-design your own plan with your advisor and make informed decisions for your future. Your advisor can incorporate new strategies and discuss financial risks and opportunities while stress testing your financial plan.

Plus, you can see a breakdown of your projected Net Worth on an annual basis.



For illustrative purposes only. Not based on actual client data.

## Legacy Studio

Wealth Studios can help simplify the complexity of estate techniques. It demonstrates the transition of wealth between generations, the impact of establishing trusts, and the potential benefits of various gifting strategies.

The Family Tree View overlays the flow of assets between your heirs and entities and updates live with the modeling of strategies and recommendations.

The fairness planning module will help you to identify if your children are receiving an equal share of your wealth while including past, present and future gifts.

**Learn more about how estate planning with Wealth Studios can help you by talking to your financial professional today.**



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