Investment Advisor Legacy Planning Document

Date: [Insert Date]

Client Name: [Client's Full Name]

Client Address: [Client's Address]

Dear [Client's Name],

As your investment advisor, I understand the importance of legacy planning in securing your financial future and ensuring your wishes are honored. This document outlines our discussions and the proposed strategy for your legacy planning.

1. Objectives

Our primary objectives for your legacy planning include:

- Minimizing tax liabilities for your beneficiaries
- Ensuring a smooth transition of assets
- Reflecting your values and wishes in the distribution of your estate

2. Asset Overview

List of key assets to consider in the legacy plan:

- Real Estate: [Property Details]
- Investments: [Investment Accounts]
- Bank Accounts: [Account Information]

3. Proposed Strategies

We recommend the following strategies:

- Create a will and establish trusts
- Review beneficiary designations
- Consider charitable contributions

4. Next Steps

Please review this document and reach out with any questions. We will schedule a follow-up meeting to finalize your legacy planning strategy.

Best Regards,

[Your Name]
[Your Title]
[Your Company]
[Contact Information]