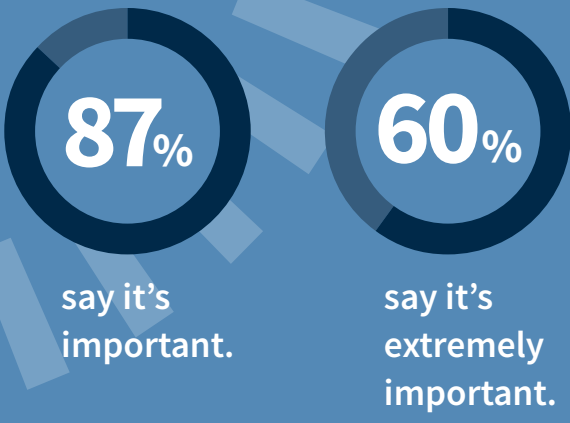


# What do you want for the future of your wealth?

Deciding what you want from your wealth – and for its future – is complex and deeply personal. To broaden our perspective on the process of transferring wealth from one generation to the next, we asked investors to tell us what matters most to them when it comes to sharing their success.

## MAINTAIN FAMILY HARMONY



## ENSURE HEIRS ARE READY



## COMMUNICATION

Open, consistent communication is a critical element of passing on wealth successfully – and our respondents seemed ready to talk.

## START THE CONVERSATION EARLY

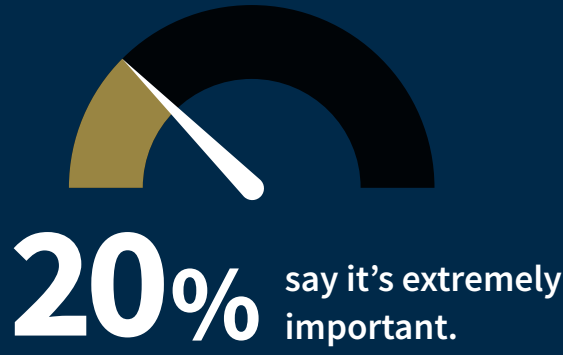
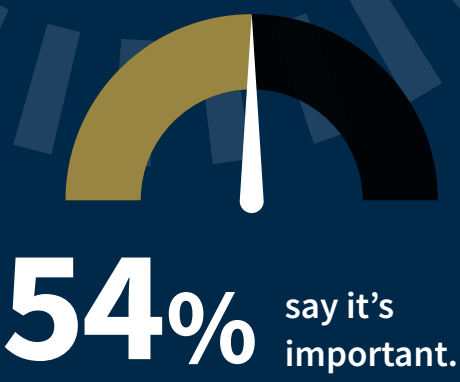
7 in 10

say proactive communication from a loved one ahead of a significant inheritance is important.

## BE TRANSPARENT ABOUT EXPECTATIONS AND WHO GETS WHAT

89% say it's important.

## MAKE A POSITIVE PHILANTHROPIC IMPACT



## PHILANTHROPY

Charitable giving is a fundamental – and growing – part of sharing success. And beyond knowing where money should go, respondents want to know the whys.

## GIVE BIG

12%

plan to leave more than a quarter of their wealth to charitable causes.

## KNOW THE STORY

3 in 5

would want to hear the impactful stories that shaped the values and character of the person leaving an inheritance.

## CONSIDER THE IMPACT OF TAXES

91%

agree that tax efficiency is an important part of the transfer planning process.

## TAXES

Taking a strategic approach to taxes can help to preserve wealth at transfer. Respondents know that – but it doesn't necessarily mean they're ready.

## CLOSE THE PREPAREDNESS GAP

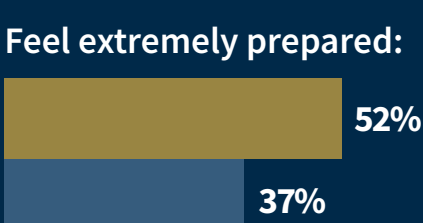
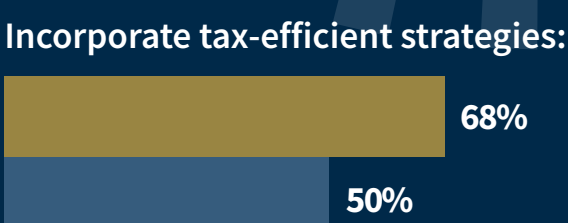
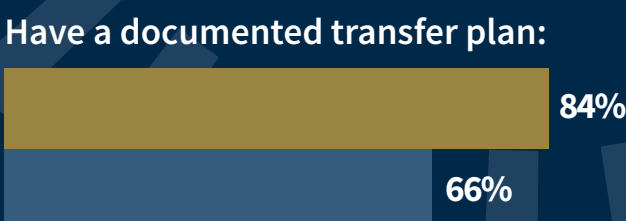
37% either don't have tax-efficient strategies in their plans or aren't sure, but ...

69%

of those respondents are "somewhat" to "very" interested in exploring tax planning.

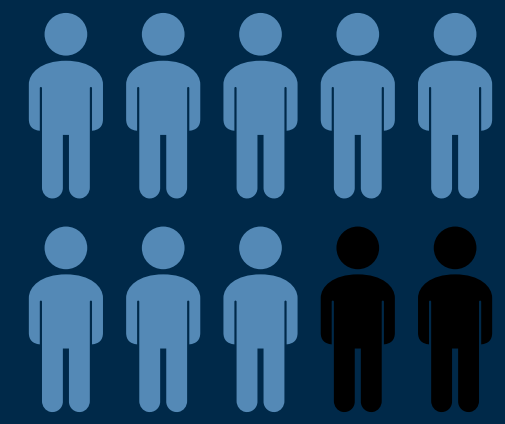
## PREPARE FOR WEALTH TRANSFER

Work with a financial advisor  
Don't work with a financial advisor



## YOUR TEAM

When it comes to achieving what we want for our wealth, the key could be the people we surround ourselves with. Respondents who worked with a financial advisor and other professionals were likelier to feel ready for wealth transfer.



82%

say working with an advisor increased their confidence in their plans.

## Keep your wealth going

Preserving your wealth's momentum from one generation to the next (and the next and the next) starts with a plan. We can help you make the first move.

**RAYMOND JAMES**