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## WEALTH PRESERVATION

The concept of wealth preservation is extremely broad, but at its core it is very simple: minimizing risks to the value and ownership of your assets during your lifetime, in the event of incapability, and on your death. The shape of wealth preservation is different for each individual, family, and business. It will reflect the nature of assets involved and the competing rights and claims that affect those assets. The Estate and Wealth Advisory Group works with clients to create plans for their personal and business affairs that reflect their unique obligations and priorities.

In creating a wealth preservation plan, factors that will commonly be considered to give effect to a client's objectives include:

- Impact of family law on plans
- Tax efficiencies
- Wills variation implications
- Contractual obligations such as shareholders' agreements
- Creditors' rights
- Risk tolerance
- Probate fees
- Cost benefit of implementing plans

**Related Practices**

Estate and Trust Administration

Estate Litigation

Family

Personal Planning: Wills, Powers of Attorney, and Health Care



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Private Business and Family  
Enterprise Planning

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