



Mentor RIA Consulting

Allowing you to focus on what you do best

Do You Still Need Estate Planning?

Many clients wish to leave a legacy of some kind, whether to children and grandchildren, favorite charities, the community or others. The amounts of these legacies vary from client to client and may be impacted by the markets and other factors beyond our control. Even if clients do not plan to leave a specific legacy, there often is a need to plan for any assets left at the end of a lifetime. But what if your client tells you that he or she does not need to do estate planning because they will not be subject to estate tax at their death?

For more, contact us at www.mentorriac.com or e-mail us at info@mentorriac.com