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Estate & Succession Planning

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Outlines estate and succession planning for a client — will, nominations, joint holding, trusts for larger estates and gifting — with the key actions to take (nominations across accounts, a valid will) and considerations for the family and business situation. Use this to plan how wealth passes on. Wills and trusts need legal drafting, so pair this with a lawyer.

Purpose of this tool & output

Plan how wealth passes on

How the output is used

Use the guide to plan how a client wealth passes on through wills, nominations and structures.

Important cautions

AI-generated outline; wills and trusts need legal drafting, consult a lawyer.

Companion documents

- Financial Plan Builder
- Goal-Based Planning Calculator
- Risk Profiling Questionnaire
- Asset Allocation Advisor
- Investment Tax Planning
- RIA Registration & Compliance

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.