Family Legacy Planning

Helping families plan for what their wealth will achieve beyond their lifetime

Planning for the future can be a complicated and overwhelming task. It can be a nightmare to navigate the legacy you want to leave and how best to engage your heirs while understanding all the financial implications. To protect your legacy and build a better future for your loved ones, you need more than legal documents in place.

At Sherwood Financial Partners, we go beyond mere documentation to build a legacy plan combining comprehensive estate, investment, insurance, and tax strategies. In this way, we help you gain control, transfer your wealth efficiently, and execute your wishes.

As a wealth advisory firm, we help high-net-worth families like yours plan for what their wealth will achieve beyond their lifetimes. Working with you, we employ our proprietary legacy planning process to organize, visualize, and actualize your values and wishes, helping to ensure a lasting legacy for future generations.

Common Questions

- Will our family be OK after we're gone?
- Can we afford to be charitable with our estate?
- How does our estate plan work logistically?
- Does our plan have any tax or investment inefficiencies that should be remedied?
- Are our assets properly titled and set up correctly for a smooth transfer after we're gone?

SHERWOOD
FINANCIAL PARTNERS

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How We Help

You've worked hard to build your wealth. We partner with you to help ensure it is responsibly passed down to your heirs.

- Our team members have personal experience in the transition of wealth and a passion for making sure our clients' wealth transitions are well executed.
- We designed our firm for longevity. We will be here to manage your legacy not only for you but for future generations of your family.
- We employ advanced financial, investment, and tax planning processes to help you visualize your legacy plan and its impact on your beneficiaries—both family members and charities.
- We have assembled a team with expertise including the CERTIFIED FINANCIAL PLANNER™ (CFP®), Juris Doctor (JD), Certified Public Accountant (CPA), and Certified Financial Analyst (CFA) certifications.

Services

- Legacy Financial Planning
- Estate Planning Analysis
- Family Legacy Meetings
- Family Financial Coaching
- Charitable Giving Strategies
- Investment Management
- Values-Based Investing Options
- Asset Transfer Services
- Tax Planning

What You Receive

- Our team will help you visualize your legacy with a custom legacy plan that lays out your financial situation, the logistics of your documents, any tax inefficiencies that should be remedied, and an overview of your investments.
- Your advisor will meet with you and your spouse to review your legacy plan and can walk your heirs through the plan as well.
- We coordinate with other professionals, such as your accountant or attorney, to help ensure that your plan is seamlessly executed.
- We offer financial literacy seminars to help educate younger family members on responsible financial management.

How Can We Help You?

Let's discuss how we can help you build a lasting legacy. Schedule a complimentary 15-minute introductory call today.

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