EBERST WEALTH ACADEMY

Pass on more than assets.

Family & legacy · Lesson takeaway

The idea to keep

A legacy plan needs both documents and communication. Knowing who to contact can be as important as knowing what exists.

Check your understanding

What is a useful first step in family preparation?

A clear inventory and conversation help people prepare. Share sensitive records only through an appropriate secure process.

Bring the idea into your life

Which assumption or uncertainty matters most in my circumstances?

What would I like to ask Bruce before making a decision?

Continue learning

Read the lesson and explore its illustration
Fidelity · Family financial planning conversations

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