



## Estate Concerns

- Will and succession planning
- Capital gains minimization
- Inter-generational wealth transfer
  - Estate equalization
  - Reducing probate costs
- Increasing privacy in estate distribution
  - Philanthropy

## Investment and Retirement Income Planning

- Wealth preservation
- Ensuring lifelong income
- Creating tax-efficient income
  - Addressing Clawback

**boomer**  
plus



**boomer**  
financial