How can I bring order to my estate?

Structuring an estate plan to benefit your blended family and charity

BV Group
Private Wealth Management

Client challenge

- Our 75-year-old client was experiencing complete financial disorganization. He was in a second marriage with two sets of children. He had also had significant philanthropic endeavors. But he had no cohesive estate plan that addressed all his priorities and accumulated wealth. Because of our team's ability for bringing focus and clarity to complex and sophisticated estate plans, he was referred to us for help in putting his personal and financial life in order.

Together we found an answer

We served as "financial quarterback" for our client to align all of his needs, including:

- **Creating an estate planning strategy** to support his long-term goals and the success of the family and foundation
- **Coordinating with our philanthropic consultant** who brought his "blended" family together on the issues
- **Introducing a charitable foundation** to which he could leave the bulk of his assets and reduce estate taxes
- **Building a collaborative team of specialists**—estate planning attorney, insurance agent, trust officer to advise him on all aspects of estate planning

The future

- We eliminated estate taxes while providing a plan that will continue on—even after our client's passing. Our investment plan provides consistent returns with less risk.
- In terms of his stress about the future, we continue to serve as our client's sounding board for concerns and many of his life questions. He truly trusts our advice about putting challenges in perspective and adapting to change without worry.

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