The Legacy Workshops

Creating, Growing, Enjoying & Sharing Your Financial Legacy

TO SCHEDULE A LEGACY WORKSHOP FOR YOUR COMMUNITY, FACILITY OR ORGANIZATION:

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Specializing in financial legacy education, our licensed agents bring important concepts and sometimes overlooked details to light, for those who desire to create a vision for their family's financial legacy – from accumulation to growth, to distribution, to transfer to heirs; focused on safety of principal with tax-advantaged growth and distribution.

Some specific areas of learning are Tax-free Retirement, Retirement Asset Preservation With Growth, Flexible College Savings, Final Needs Planning, Final Expense Planning (including options for those with medical history).