

Managing Wealth Across Multiple Generations

As parents or grandparents you focus a great deal of your time, energy and emotions on the physical and financial security of your children and grandchildren. From providing for their everyday needs early in life to ensuring funding is available for the best possible educations, your financial confidence is inextricably tied to ensuring they are well prepared for whatever life has in store.

Yet, as children reach adulthood and begin careers of their own, they often find themselves without the guidance and resources they need to make difficult and life-impacting financial decisions:

- ◆ Since many individuals and families in their 20s, 30s and even 40s have not yet reached their peak earning years or amassed significant wealth of their own; many financial advisors are not interested in working with them to ensure they remain on track toward achieving long-term financial goals.
- ◆ Often, the financial resources available to young individuals and families are limited to “do-it-yourself” online calculators or transaction-based brokerage models that may not have your children’s best interests at heart.

At Planned Financial Services (PFS) we strongly believe that when sound financial habits and behaviors are developed early in life, individuals and families have a better chance of pursuing the goals they set out for themselves. That’s why our advisors take great pride in assisting multiple generations of our clients in planning for a more secure financial future.

We welcome the opportunity to educate your adult children and grandchildren on the important financial topics that will impact their futures from sound asset allocation to prudent debt management and long-term savings and investment strategies.

We are happy to provide a complimentary consultation or second opinion at any time. Simply contact us for an appointment.

Increasing your financial confidence across the generations



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