



Wealth Transfer Strategy

You | *Potential Taxes Saved*

\$ 519,622

Children | *Potential Income Generated*

\$ 345,866

a year

\$ 12,451,173

Lifetime

Grandchildren | *Potential Additional Legacy*

\$ 1,543,468

This worksheet represents a hypothetical scenario and does not predict future results. The financial professional you are working with does not provide tax, legal or investment advice. Please consult qualified professionals about your individual needs.