

MULTI-GENERATIONAL PLANNING

About **Multi-Gen Planning**

Multi-generational wealth planning often requires the expertise of financial advisors, estate planners, tax professionals, and attorneys. At Diazo, our planning-aligned partnerships provide personalized guidance and help families navigate complex legal and financial matters.

Multi-generational wealth planning involves strategies aimed at preserving and transferring wealth from one generation to the next. It's a comprehensive approach that considers various factors, including financial assets, family dynamics, tax implications, and philanthropic goals.

In planning, one size does not fit all. The success of our clients derives from understanding the unique details of your situation and planning accordingly. We provide services and support with that in mind. At Diazo, we have an exceptionally-curated network of trusted partners – all of whom we have vetted and trust to provide the premium customer service our clients deserve and come to expect.

Overall, inter-generational wealth planning is about creating a roadmap for the preservation, growth, and responsible transfer of wealth across multiple generations. By taking a proactive and holistic approach, families can minimize potential risks and conflicts while ensuring their wealth supports their long-term goals and values.

Together, your family and our team of professionals collaborate to make certain that all aspects of generational wealth planning are integrated into a cohesive strategy. Our goal is to provide interdisciplinary expertise and guidance that maximizes the effectiveness of your plan and provides our clients with peace of mind.

Multi-Gen Planning **Benefits**



Comprehensive Financial Planning – Plans encompass all aspects of financial life, including investments, taxes, estate planning, insurance, and retirement



Tailored Solutions – Crafted personalized solutions that incorporate values, priorities, concerns, and goal-alignment



Objective Advice – Our advisors are fiduciaries, meaning they are legally obligated to work solely in your best interest



Education and Guidance – Advisors demystify complex financial concepts, provide clarity, and empower clients to make informed decisions and take control of their financial future



Planning-Aligned Partnerships – Coordination with other professionals to collaborate on minimizing gaps and maximizing success



Adaptability and Flexibility – Continuous monitoring of your plan to accommodate changing circumstances, shifts in market conditions, tax laws, and family dynamics



Diazo, LLC is a Registered Investment Advisor that conducts business only in states where it is properly registered or is excluded from registration requirements.



FINANCIAL INDEPENDENCE
BY DESIGN™

Multi-Gen Planning Key Aspects

1. ASSET PROTECTION

One primary goal of multi-generational wealth planning is to protect assets from risks such as creditors, lawsuits, and divorce. This may involve establishing trusts, utilizing asset protection vehicles, and proper insurance coverage.

2. TAX EFFICIENCY

Minimizing tax liabilities is a significant aspect of wealth planning. Strategies may include gifting, estate planning, charitable giving, and utilizing tax-advantaged accounts. Estate tax, gift tax, and generation-skipping transfer tax are essential.

3. ESTATE PLANNING

Estate planning involves orderly transfer of assets upon death while minimizing taxes and administrative costs. This often involves creating wills, trusts, powers of attorney, and other legal documents to ensure assets are distributed according to the individual's wishes.

4. EDUCATION & COMMUNICATION

Effective communication among family members is crucial for successful wealth transfer. Educating heirs about financial responsibility, wealth management principles, and family values can help prepare them for their inheritance and reduce the likelihood of conflicts.

5. PHILANTHROPIC GIVING

Philanthropy is a way to leave a lasting legacy and instill values in future generations. Establishing family foundations, donor-advised funds, or charitable trusts allows families to support causes they care about while receiving tax benefits.

6. FAMILY BUSINESS SUCCESSION PLANNING

For families who own businesses, succession planning is essential to ensure a smooth transition of ownership and management to the next generation. This may involve preparing family members for leadership roles, implementing buy-sell agreements, and addressing potential conflicts among heirs.


CONTACT US

 702.745.1800

 info@diazowealth.com



www.diazowealth.com

 2518 Anthem Village Dr, Suite 104
Henderson, NV 89052

