



ECON WEALTH
MANAGEMENT

ESTATE PLANNING SOLUTIONS

Your Wealth Has a Purpose. Your Legacy Should Have a Plan.

We bring your estate plan together into one coordinated strategy by giving you confidence today and helping create a lasting legacy for tomorrow.

Core Areas



Protect Your Wishes

- Coordinate with your estate attorneys
- Identify potential gaps in your estate documents
- Review wills, powers of attorney, healthcare directives



Align Your Assets

- Review beneficiaries annually
- Review account ownership & how they are titled
- Coordinate beneficiary designations with estate intentions



Prepare Your Family

- Facilitate family & legacy conversations
- Clarify philanthropic & charitable goals that reflect what matters most to you
- Prepare next generation to understand & responsibly manage family wealth



Simplify Your Financial Picture

- Explain different types of strategies
- Provide guidance on consolidation of accounts
- Ensure an understanding regarding key components of estate planning

Why Partner with Econ Wealth?



Trust Funding



Charitable Legacy



Tax Strategies

Your legacy deserves more than a plan. You deserve a team to help bring it all together. Let EWM help you build a strategy that gives you confidence today and your family clarity for tomorrow.

Important Disclosures: Econ Wealth Management provides general investment education and recommendations. Econ Wealth Management is not engaged in the practice of tax preparation or legal work and no comments should be construed as tax or legal advice. Tax and legal information provided is general in nature. Always consult a tax professional or attorney regarding your specific situation.