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 bygiving 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 annualy
- 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 weath

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.