NATOMA WEALTH
POWERED BY HIGHTOWER

Legacy Wealth Planning

Researchers estimate that trillions of dollars in financial and non-financial assets will be passed down from Baby Boomers to Generation X and Millennials over the next three decades. Are you and your heirs prepared?

At Natoma Wealth, we understand that wealth transfer involves more than your assets, preservation of your family's values as your wealth transitions to the next generation is equally as important

Services & Areas of Focus

WEALTH TRANSFER STRATEGIES

Estate planning, tax minimization, philanthropic planning, establishment/management of trusts and foundations, and value-based financial planning

FAMILY GOVERNANCE

Development of family mission statement and facilitation of family meetings

NEXT GENERATION EDUCATION

Custom family education plans focused on enhancing understanding of core portfolio, long-term goals, investing best practices and/or trustee and beneficiary responsibilities

MULTI-GENERATIONAL WEALTH PLANNING

You have spent a lifetime building a strong foundation for your family; imagine if you were able to pass it not only your material wealth but also the values and wealth building skills that you have learned and lives

From business transfer to personal wealth, Natoma Wealth offers you and your family specialized, consultative wealth transfer estate planning and long-term financial planning services to help you preserve your legacy.

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