Living Legacy Planning

Helping families plan for what their wealth will achieve beyond their lifetime

Planning for the future can be a complicated task. It can feel overwhelming to determine the legacy you want to leave and to understand the financial implications for your heirs. To protect your wealth and build a better future for your loved ones, you need more than legal documents in place.

At Sherwood Financial Partners, we go beyond documentation to build you a legacy plan that combines comprehensive estate, investment, insurance, and tax strategies. In this way, we help you gain control over your assets, transfer your wealth efficiently, and execute your wishes.

As a wealth advisory firm, we help high-net-worth families like yours plan for what their wealth will achieve beyond their lifetimes. We employ our proprietary legacy planning process to organize, visualize, and actualize your values and wishes, helping you leave a positive impact on the people and causes you care about.

Common Questions

- Will our family be ok after we're gone?
- Can we afford to be charitable with our estate?
- How does our estate plan work logistically?
- Does our plan have any tax or investment inefficiencies that should be remedied?
- Are our assets properly titled and set up correctly for a smooth transfer after we're gone?

SHERWOOD
FINANCIAL PARTNERS

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How We Help

You've worked hard to build your wealth. We partner with you to ensure it is responsibly passed down to your heirs.

- Our team members have deep experience in the transition of wealth and a passion for making sure our clients' wishes are well executed.
- We have designed our firm for longevity. We will be here to manage your legacy not only for you but for future generations of your family.
- We employ advanced financial, investment, and tax planning processes to help you visualize your legacy plan and its impact on your beneficiaries—whether family members or charities.
- We have assembled a professional team with the following certifications: CERTIFIED FINANCIAL PLANNER™ (CFP®), Juris Doctor (JD), Certified Public Accountant (CPA), and Chartered Financial Analyst (CFA).

Services

- Legacy Financial Planning
- Estate Planning Analysis
- Family Legacy Meetings
- Family Financial Coaching
- Charitable Giving Strategies
- Investment Management
- Values-Based Investing Options
- Asset Transfer Services
- Tax Planning

What You Receive

- Our team will help you visualize your legacy with a custom legacy plan that lays out your financial situation, any tax inefficiencies that should be remedied, and an overview of your investments.
- Your advisor will meet with you and your spouse to review your legacy plan and can do the same with your heirs.
- We coordinate with other professionals, such as your accountant or attorney, to ensure that your plan is seamlessly executed.
- We offer financial literacy seminars to help educate younger family members on responsible financial management.

How Can We Help You?

Let's discuss how we can help you build a lasting legacy. Schedule a complimentary 30-minute introductory call today.

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