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PRESERVING YOUR LEGACY

After a lifetime of hard work and dedication to your family, you want to make sure your legacy lasts beyond your lifetime. Building your wealth is not enough to ensure that legacy; it also requires carefully planning and deploying the best wealth strategies available.

Wealth Transfer strategies for the next generation.

In our previous newsletter, we discussed Wealth Enhancement as the first of four cornerstones of the wealth strategies we employ at The Ferrucci Company. In this edition of our newsletter, we'll talk about some of the areas of Wealth Transfer that we focus on, and how they can help you ensure that your life's work not only grows, but also survives you to the fullest possible extent.

For successful business owners and affluent families, Wealth Transfer encompasses advanced estate planning and generational concerns. Here are some of the key areas:

- **Tax Minimization.** At the very least, an effective estate plan should incorporate the minimization, if not the elimination, of estate taxes due upon your death.
- **Multi-Generational Planning.** While your family multiplies with each new generation, imagine what would happen if the wealth you've created were to be cut in half at each generation. A sound Wealth Transfer strategy should incorporate a plan to eliminate the effect of estate tax erosion across multiple generations.
- **Flexibility.** Perhaps the most important aspect of any estate plan is the ability to adapt to changes in the future, whether they are changes in family situations, adjustments to the tax code, or unforeseen circumstances. A flexible Wealth Transfer strategy ensures that you and your family maximize your ability to accomplish everything that is important to you and them.

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LOOKING DOWN THE ROAD

You might look at some of these issues and think they don't affect you, or at least that they don't affect you yet. But as Benjamin Franklin said, the only two things that are certain in this world are death and taxes. Preparing for them now is the way to mitigate their effects later. And this list of concerns is hardly exhaustive.

Planning for the certainties and the uncertainties ahead.

That's our job here at The Ferrucci Company. We look down the road, years or even decades ahead, to figure out the best plan for you and your family. We can help you find the pitfalls and opportunities that lie in your future long before they come into view.

In the next issue of this newsletter, we'll discuss some of the factors affecting your Asset Protection strategies. In the meantime, if you'd like to learn about Wealth Transfer strategies that can help ensure your family legacy, give us a call directly at 800.633.3051, or send an e-mail to david@ferruccicompany.com or paul@ferruccicompany.com.

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