

Legacy Planning

Generational Wealth

One of the most important parts of implementing a wealth strategy plan is to build generational wealth to ensure that children, grandchildren, and generations to come are financially secure.

At CORE Financial, we understand that planning for your future does not involve yourself- but your loved ones and businesses. It is crucial to take the necessary steps to help preserve the wealth you have accumulated.

There are many reasons why having an estate plan can help you and your loved ones over the long term. From avoiding probate to protecting beneficiaries and assets- an estate plan is a smart choice for anyone. Unfortunately, many individuals do not realize the importance of an estate plan until far into the wealth-building stage of their lives, limiting the potential for building a substantial end-of-life income.

Our Family Office Approach Offers Access to the Support Your Need

The team at CORE Financial can guide you in developing an estate plan that works for the needs of your family, assets, and any businesses you may have. Our family office approach means we are partnered with trusted attorneys and legal counsel that can help you organize your estate plan based on the principles of our CORE Wealth Strategy. Conveniently located in Auburn Hills, our advisors meet with clients throughout Metro Detroit and Southeast Michigan. Schedule a free strategy session today.

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Whether you need help developing an estate plan or have questions on your current one, give our experienced team a call today at (888) 600-1112 to schedule a free strategy session.

* Estate Planning services provided in conjunction with your licensed legal advisor.