Solutions & Resources: Estate & Wealth Transfer Services

At Domani Wealth, we strive to see tomorrow the way you do. That's why we start each conversation by asking, "What does your tomorrow look like?"

To answer that, we've compiled some thoughtful questions to help you plan for the future and to gain insight on the services and experience we offer as an independent wealth advisory firm. Because at Domani Wealth, our focus is to lead you to a tomorrow filled with possibilities.

How will you transfer wealth to your family?

If you cannot answer that question or if you have not reviewed your plan recently, now is the time to develop or re-evaluate your estate and gift planning. An estate plan will:

- Help ensure your wishes are fulfilled
- Eliminate the potential for misunderstandings and disputes
- Reduce confusion, stress, and anxiety for your loved ones
- Minimize the cost of death taxes, income taxes, probate fees, and more

Thoughtful planning begins with an open and honest discussion about your objectives, needs, and family dynamics. Our experienced team at Domani Wealth will also review documents that may be necessary to develop your plan, including but not limited to:

- Wills
- Revocable and irrevocable trusts
- Durable power of attorney
- Living will or health care power of attorney
- Business succession documents, buy/sell agreements, and other relevant documents

We will develop strategic recommendations to effectively implement your estate planning goals. When it comes to implementing your estate plan, our Domani Wealth team has significant experience identifying and coordinating with legal and other professionals to ensure your plans are properly designed and executed.

Start your tomorrow with informed decisions for your family and your legacy.

Tomorrow's opportunities start today.

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Contact the experienced advisors at Domani Wealth to discuss the establishment of an estate and wealth transfer planning strategy that will help protect your assets, minimize taxes, and reduce the potential for conflict.

IMPORTANT DISCLOSURE INFORMATION

Past performance may not be indicative of future results and different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/ or investment strategies recommended and/or undertaken by Domani Wealth, LLC), advice, or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, provide security or prove successful. Domani Wealth is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice.

Please remember that it remains your responsibility to advise Domani Wealth, in writing, if there are any changes in your personal/ financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services.

<u>The scope of the services provided depends upon the needs of the client and the terms of the engagement.</u>