What to Expect: FG Legacy Services

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Legacy Services Client Overview

Financial Gravity Legacy Services is a specialized part of our family office, dedicated to helping you grow and preserve your legacy. Whether it’s through setting up a trust—a powerful tool to manage, protect, and pass on your assets—or exploring strategies like a 453 Rollover™, Roth conversion, Charitable Remainder Trust, or Donor-Advised Fund, our team is here to guide you every step of the way. We’re committed to helping you create a legacy that lasts for generations.

We know wealth management is about more than just numbers—it’s about creating a legacy and securing your future. Our Family Office Services take a holistic approach, bringing together experts across financial disciplines to build a personalized blueprint that helps you live life on your terms.

To learn more, view our Family Office Process.

Here are a few helpful trust documents that can answer common questions about why a trust might be right for you and what the process typically looks like.

- Why do I need a trust?
- What to Expect?
- Trust Worksheet
- Legacy Series Brochure
- Third Party Trustee Information

Here are a few helpful documents that explain some of our leveraged strategies. We'll continue to add more resources as they become available.

- 453 Rollover ™ Structure
- Leveraged Legacy Series Brochure
- Leveraged Legacy Series Options Brochure

More Coming Soon!

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