

INTERGENERATIONAL SERVICES



FAMILY  
WEALTH AND  
ESTATE PLANNING

AMD WILL HELP YOU REACH YOUR PERSONAL FINANCIAL GOALS

# Family Wealth and Estate Planning

## Wealth. We Protect Yours.

The AMD Family Wealth and Estate Planning team delivers one of a kind approaches for one of a kind individuals and families to help build assets now and preserve them for future generations and favorite charities.

Whether you are single or have generations you want to protect, our comprehensive approach to building and maintaining wealth and planning your estate ensures we focus on exactly what is most important to you and provide you with sound and meaningful recommendations. With more time dedicated to our clients, we offer individually tailored financial solutions and follow it with superior execution.

## We Listen

Understanding your immediate and long-term goals is key in helping you reach your financial goals. We will listen to what you want and then help you chart a course to achieve it. We will discuss choices that can weather changes in your family, in your goals, in tax legislation and the economy. Change is inevitable and we will help you design a plan that is flexible enough to accommodate alterations in direction. AMD wants to build a consistent and on-going relationship and partner with you to grow your assets and achieve long-term financial goals.

## We Work with Your Advisors

We are one of the St. Louis area's most comprehensive providers of tax, retirement planning and other vital services to help high net worth individuals manage wealth. We work in tandem with your investment advisor, legal counsel, banker and others to ensure you receive the best advice and care from all facets of your financial landscape. We receive no commissions and we do not sell any products so you can be assured that the advice we provide is completely objective.

Our comprehensive array of services allows us to develop an integrated, cohesive strategy geared toward attaining your financial objectives:

- Tax planning and preparation
- Estate and trust planning and coordination with your attorney
- Retirement planning
- Stock option analysis
- Business succession planning
- Family CFO and Financial Concierge Services
- Executive change in-control planning
- Education planning
- Cash flow planning
- Charitable and philanthropic giving
- Insurance selection and planning
- Personal financial report analysis
- Debt analysis
- Asset allocation review with your investment advisor
- Investment management with your investment advisor

## Do you need a Trust?

Regardless of your age or your economic situation, well thought out planning is critically important in ensuring that your assets will be preserved and eventually distributed as you wish. Through close collaboration with you, your attorney and other advisors, we will help you analyze, implement and monitor your estate and trust plans. We can help you:

- Set goals and objectives
- Estimate your net worth
- Protect your current assets and build your wealth
- Determine insurance needs for today and in the future
- Plan for appropriate retirement income
- Minimize estate and other tax liabilities
- Monitor and adjust your trust and estate plans, as needed
- Preserve wealth for future generations
- Maximize trust, gifting and planned giving benefits
- Avoid the cost, time and public disclosure involved with probate
- Control the distribution of your assets

For those of you with significant assets, setting-up a trust and/or estate plan is critical. But this type of planning is also important for those interested in building wealth over time. AMD can give you the peace of mind that your assets, large or small, are working for you and your family.

## We Help You Reach Your Goals

Over the course of a lifetime, you have many decisions to make and your financial picture is a critical component in many of those decisions. We implement a plan of action that will minimize taxes and build wealth for you and those most important to you. Over the last 45 years, we have helped many high net worth individuals make wise choices that have greater benefitted their families

We pride ourselves on our ability to identify unique solutions for unique individuals and families. There's only one you. For that reason alone, we'll deliver a wealth and estate plan that is all about you. We welcome the opportunity to become one of your trusted advisors in creating a comprehensive estate and wealth management plan that works for you today, tomorrow and in the future.

## Clients We Serve

Our clients come from varied backgrounds, including clients who are:

- Owners of privately-held companies
- Getting ready to sell or have recently sold a business
- Buying a business
- Recipients of inherited wealth
- Recipients of assets earned from compensation programs
- Successful business men and women
- Athletes and entertainers
- Parents and grandparents who want to provide for future generations
- Young entrepreneurs with potential to build wealth over time

If you have already built your wealth or are just starting, AMD has experience in working with diverse circumstances. We can design, implement and monitor a plan that is right for you.

## ■ Let us be your first call for trusted financial advice:

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Count on your personal and estate planning AMD advisor for connectivity to your entire financial picture. We stay on top of emerging trends, communicate with your advisors and offer a clear and common sense wealth building perspective.

## PROVIDING SOLUTIONS

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We are consultants, accountants, valuation and business litigation experts, advisors, employee benefits administrators, technology **solution providers** and financial planners. Since our founding four decades ago, AMD has delivered **full-service** accounting, tax and consulting services to the business marketplace and individuals. Our continuous growth is attributed to our philosophy of going beyond traditional accounting services by linking **sophisticated technology** with personal expertise to provide the highest quality service possible. We also are committed to assisting **individuals** and their families with building their wealth.



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