[Are You (And Your Clients) Ready for the Great Wealth Transfer?]

As trillions of dollars transfer from baby boomers to the next generations over the coming decades, many advisors fear seeing their managed assets slip from their grasp as clients' beneficiaries take their money elsewhere. In fact, 66% of children fire their parents' financial professionals after inheriting their parents' wealth! Will this happen to you?

In the upcoming two to three decades, as much as $124 trillion* will be passed down from older Americans to younger generations, including nearly $100 trillion from Baby Boomers and older generations, representing 81% of all transfers. The balance is projected to go to charities.

Are these your clients today – at or near retirement? What will happen to these assets over the next 5-15 years? What can you do to keep these assets in your portfolio?

We have researched and developed value-add tools aimed at helping you succeed during the Great Wealth Transfer – including two seminars we can deliver to your team!

*Cerulli Associates, U.S. High Net Worth and Ultra-High Net Worth Markets, 2024

Read the Client Guide

Related Value-Add Marketing Resources

The Great Wealth Transfer seminar

A Security Benefit representative can deliver this presentation to your team. Please contact us at SBMarketing@securitybenefit.com to schedule a seminar.

Download the Presentation >

Great Wealth Transfer Handout

A handy reference to accompany our Great Wealth Transfer seminar.

Download the Handout >

Extending Benefits of Inherited IRAs brochure

This brochure provides an overview of inherited IRAs and includes a case study to show how beneficiaries can extend the growth of the IRA and spreads out the payment of taxes.

Download the Brochure >

Guide to Inherited IRAs brochure

An overview of Inherited IRAs, including distribution rules and options.

Download the Brochure >

Inherited IRAs At-a-Glance sales idea

A one-sheet overview of inherited IRAs, including beneficiary options for spousal and non-spousal beneficiaries.

Download the Sales Idea >

From Boomers to Zoomers: Tailoring Financial Conversations for Every Generation

One of our representatives can deliver this presentation to your team and prepare them for communicating to clients of all generations in and beyond their working years.

Download the Presentation >

Unlocking the Power of Connection

This guide for Financial Professionals will help your team better understand the approach and keywords they can use to connect effectively with each generation.

Download the Brochure >

Leading a Family Meeting on Wealth Transfer

A guide to help you facilitate a potentially difficult conversation with families about wealth transfers.

Download the Sales Idea >

Shareable Content

Share "The Great Wealth Transfer: Tips for Givers and Receivers" with your clients.

Email Your Clients

Related Resources

- Six Key Considerations of Estate Planning
- Client Strategies: Examining a Declining Rate Environment
- More Value Add Resources