Estate planning is not a DIY task

Let us help you, using our in-house estate planning resources.

Having an estate plan ensures that your legacy will live on. But these decisions can be intimidating, existing at a nexus of numerous investment vehicles, confusing tax regulations, opaque insurance policies and legal contracts.

Working with a Mesirow Wealth Advisor can help to simplify the process and bring peace of mind. Mesirow has the resources and expertise you need, in-house and in one place, to help you make sense of an existing plan or establish your own plan in partnership with your estate attorney. We can:

- **Analyze** your current plan, provide a visual summary of the plan, analyze asset flows according to the terms of the plan, and offer considerations for future planning or recommendations on changes to asset titling
- **Work closely** with your existing legal and tax advisors to ensure your estate plan aligns with your goals and vision
- **Provide** a state and federal estate tax analysis, including a review of tax planning options to reduce or eliminate estate tax exposure
- **Offer guidance** regarding charitable gifting strategies like charitable trusts, donor advised funds and private foundations
- **Provide direction** on business succession planning, whether it involves a transition to the next generation, to other partners or key employees, or to third-party purchasers
- **Offer planning** considerations for children with special needs, blended families, and other unique circumstances
- **Introduce** you to core estate/legacy planning concepts if this is your first foray into the estate planning process

We'll help you know what to expect and prepare for future contingencies, at no cost as part of our valued commitment to serving you and your family. To learn more, contact us or visit our website.

Additional resources that can help

Knowledge Center | As your needs and objectives change over time, we're here with facts, updates and financial planning guidance. Check out some of the most popular perspectives from our Knowledge Center.

Legacy checklist | This checklist is designed to help guide you through a variety of tasks when you lose a loved one.

Legacy guide | Our guide "Blaze your trail: Ensure your legacy by mapping out a thoughtful wealth transfer strategy" is designed to help you begin that journey and to give you a roadmap to making a legacy plan a reality.

About Mesirow

Mesirow is an independent, employee-owned financial services firm founded in 1937. Headquartered in Chicago, with locations around the world, we serve clients through a personal, custom approach to reaching financial goals and acting as a force for social good. With capabilities spanning Global Investment Management, Capital Markets & Investment Banking, and Advisory Services, we invest in what matters: our clients, our communities and our culture. To learn more, visit mesirow.com and follow us on LinkedIn.

Mesirow Wealth Management is the firm's founding capability. We are the initial namesake business of Norman Mesirow, whose vision was to serve with purpose, applying the highest standards of professionalism in advising individuals and families on their most important life goals. We look forward to having an opportunity to serve you and your family.

To learn more, visit mesirow.com/wealthmanagement, call 847.681.2300 or email wealth@mesirow.com