CREATING YOUR CAREER LEGACY

Sound legacy plans focus on the here and now, with the knowledge that your work ethic and the actions you take today can make a lasting imprint in the lives of others. Below are a few strategies that can help you live your legacy, whether you're an employee or entrepreneur.

FOUNDATIONAL



TAKE ADVANTAGE OF WORKPLACE BENEFITS

- Mentoring
- Time off for volunteering
- **Corporate donation match**



- Start a business
- **Change careers**
- Stretch into a new role



Create a solid exit plan

> IF YOU'RE A BUSINESS OWNER

Key man insurance

Other types of insurance for entrepreneurs .





Select a retirement plan for employees

- Prepare to sell your business

> ADDITIONAL

IF YOU'RE AN EXECUTIVE

Concentrated equity strategies

Liquidity planning



MAKE YOUR MARK.

We can help you create a career legacy that will last long after you leave the office. Let's get started today.

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