

ATLANTIC TRUST

PRIVATE WEALTH MANAGEMENT

Case Studies: Creating Solutions and Strong Relationships

When Atlantic Trust understands your needs—whether for next year or the next generation—we develop solutions that are highly personal, a reflection of your values and customized to your goals.



Generation Next:

A Family—and a Plan—in Transition

Conventional wisdom holds that the foundation of any estate plan is a properly executed will with very clear terms of distribution. The wisdom of reality is different. Life changes—and the estate plan needs to change along with it. The Dean family realized this when we revisited their 10-year-old estate plan. Their wealth and family had changed—both had grown in size. The Deans wanted their grandchildren to receive the bulk of their wealth. They still wanted to pass assets to their adult children, but once it became clear that two of their children did not plan to marry and have families, the grandchildren became the focus. Their old estate plan, however, put their goal of benefiting the grandchildren at risk. Its other big weakness? The government was going to get a substantial portion through estate taxes. The Atlantic Trust team worked with the family's attorney to create a new estate plan for the Deans that used sophisticated, but simply-focused, tactics to give the Deans exactly what they wanted. And it wasn't just an increase in assets for their grandchildren. It was a good night's sleep.

This case study is based on actual Atlantic Trust clients' experiences, but names and certain details have been changed to protect our clients' privacy.

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