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Living Legacy Planning

A different way to think about legacy

Most people think of legacy as something that happens after they're gone.

The conversation often centers on estate documents, trusts, taxes, beneficiaries, and the transfer of assets. While those decisions are important, they represent only part of the picture.

At Sherwood Financial Partners, we believe legacy begins long before an estate is settled.

Living Legacy Planning is a philosophy that encourages individuals and families to think intentionally about how their wealth can support the people, values, experiences, and causes that matter most while they are still living.

Rather than focusing exclusively on what will be left behind, Living Legacy Planning asks a different question:

What impact do you want your resources to have today?

Beyond the transfer of wealth

Financial planning often focuses on preserving and transferring assets efficiently.

Living Legacy Planning expands the conversation.

It recognizes that wealth can influence far more than financial outcomes. It can shape family relationships, create opportunities, support charitable causes, encourage stewardship, and help pass along values that endure beyond a balance sheet.

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For many families, the most meaningful legacy is not simply what is inherited. It is the lessons learned, experiences shared, conversations had, and opportunities created along the way.

Legacy as participation, not just inheritance

Many families spend years planning how wealth will be transferred, but far less time discussing how future generations will be prepared to receive it.

Living Legacy Planning encourages families to engage those conversations earlier.

That may include preparing heirs for responsibility, involving family members in charitable giving, sharing family values and intentions, or creating opportunities for younger generations to participate in decisions that affect the family's future.

It may also mean choosing to invest in shared experiences while everyone is together. Those memories, traditions, and opportunities for connection often become part of a family's legacy long before wealth is ever transferred.

The goal is not to control future outcomes. It is to create understanding, alignment, and a stronger connection between wealth and purpose.

Stewardship in practice

Every family's situation is different, but Living Legacy Planning often leads to conversations about:

- Family wealth transfer
- Charitable giving and philanthropy
- Preparing children and grandchildren for inheritance
- Retirement and life transitions
- Family communication and decision-making
- Aging parents and caregiving responsibilities
- Values-based financial decisions
- The long-term impact of wealth

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These conversations are not separate from financial planning. They are often the reason financial planning matters in the first place.

A broader definition of success

At Sherwood, success is not measured solely by portfolio performance, tax efficiency, or estate outcomes.

Those things matter.

But many clients are equally concerned with questions such as:

- Are we preparing our children well?
- Are we using our resources intentionally?
- Are we supporting the people and causes that matter most?
- Are our financial decisions aligned with our values?
- Are we creating the kind of legacy we hope to leave behind?

Living Legacy Planning creates space for those questions.

Because in our experience, the most meaningful financial decisions are rarely just about money. They are about people, purpose, responsibility, and the future we hope to help create.

Media resources

Executive bios, company information, media-ready headshots, brand assets, and additional resources are available at:

sherwoodfp.com/media

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