

Have you thought about your legacy?

“Legacy” is the meaning your
wealth takes on when you
reach the point of sharing it.

Beyond supporting family members, what
kind of impact would you like to have on
your community, your country or beyond? →



RUBACH WEALTH
Insurance & Financial Strategies

EVEN IN THE FACE OF SUSTAINED DEDICATION, HARD WORK AND INCREDIBLE ACCOMPLISHMENT, IT'S UNUSUAL FOR WOMEN TO THINK IN TERMS OF THE LASTING IMPACT OF THEIR WEALTH.

AT RUBACH WEALTH, WE BELIEVE THAT EVERY WOMAN SHOULD HAVE CONTROL OF HER LEGACY.

We're here to help you recognize the potential of your wealth and ensure that it continues to have a meaningful impact well into the future, according to your intentions.

Here are some key thoughts on defining and realizing your legacy objectives.

INTENT →

The first step in identifying "what it's all about" is to make sure you've asked the question – and that you have someone you trust with whom to discuss your options. Planning for what happens to your wealth beyond your use of it should be more than a practical concern. This is an opportunity for big dreams and bold intentions. We believe in providing financial advice that goes a step beyond maximized returns by incorporating a deep understanding of what motivates you and will give you satisfaction.

ALIGNMENT →

Your choice of financial tools should depend on the specifics of your life, which will change over time. We can work with you to develop a flexible plan that will be adjusted over the years in line with your evolving priorities. Ensuring sound alignment of financial products with your current and future circumstances will give you increased control of your wealth and stronger potential for a meaningful legacy.

MEANING →

Your wealth can be channeled within your family, shared outwardly with people or causes that matter to you, or both. The two main concerns are to maximize what you can give and to ensure it creates the impact you intend. Ultimately, the goal is to make your money mean what you would like it to mean and for your giving to be recognized in a manner that suits your wishes.

PLANNING →

Your success has not come about by accident, and neither will your legacy. Together with a team of legal and accounting professionals, we can help you maximize the benefit to those you care about and minimize the loss of wealth to taxes. Our aim is to give you clarity regarding your options and empower you to make the best decisions. The earlier you start planning your legacy, the greater its potential impact.

At Rubach Wealth, we believe in using our knowledge and expertise to help women thrive financially today and have a lasting impact tomorrow and beyond. So let's start a discussion about how we can work together to build your legacy.



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