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Have you heard about the Great Wealth Transfer?

It's a phenomenon that's been making waves in the financial world and it appears everyone is talking about this. As the baby boomer generation ages, trillions of dollars are expected to be transferred to their heirs in the coming years.

It is estimated that a staggering \$84.4 trillion will be transferred to heirs or charities through 2045. This presents a remarkable opportunity for financial professionals to offer their clients effective strategies to optimize their wealth and maximize its value. With so much at stake, individuals must take advantage of expert guidance and planning to make the most of this historic wealth transfer.

Click below to download the updated "Great Wealth Transfer" sales idea one-pager to help you discuss this opportunity with your clients.

Sales Idea

Sales Video

Please reach out to your Brokerage Manager at McQueen
Kalligan to learn more.

800-294-9936



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