

Legacy Insurance Brokers Help Clients Reduce Estate Settlement Costs

*Legacy Insurance Brokers Help Clients
Reduce Estate Settlement Costs*



WESTBOROUGH, MA, UNITED STATES,
September 5, 2023 /EINPresswire.com/ --

The rising cost of estate settlements has driven consumers to seek solutions to the shrinkage of the estate of deceased family members. Estate cost settlements include probate fees, [legal](#) fees, state death tax, IRD tax and federal estate tax.

Law firms can assist in the drafting of documents to help lessen the cost of estate settlement. Financial Advisors who work in this area are experienced at the unique funding requirements for products used in trust to help mitigate the estate settlement cost. These products may include investment, [insurance](#) annuity and other products.

Financial advice firms come in many varieties, and most are not fully licensed to do all the steps necessary to execute both investment, insurance, and other solutions. For this reason, firms like Legacy Insurance Brokers, LLC. work in a team environment. It is common to have a coordinated approach with a Life Insurance Agent, Registered Investment Advisor, Health Insurance Agent, Chartered Financial Consultants, and or Certified Financial Planner Professionals in these scenarios.

Legacy Insurance Brokers, LLC. Manager, Mike Tartarini, who is also a Registered Investment Advisor, has found that the main 4 factors that come into play when organizing a strategy to reduce estate settlement cost are:

1. Complete analysis of the estate and potential cost
2. Quality up to date legal work done by a qualified legal professional
3. Integration with the investment and insurance products
4. Annual reviews and modifications

"For this purpose, we have built a systematic approach to estate settlement cost reduction" says Mike Tartarini. "We offer the initial complete analysis at our expense to determine if the client actually needs to engage our firm to solve a problem."

By offering informative webinars, public meetings, and free initial consultations, we are doing our part to help solve a problem that exists for a maturing population.

Cathy Portanova

Legacy Financial Advisors, Inc

+1 800-427-9781

[email us here](#)

Visit us on social media:

[Facebook](#)

[Twitter](#)

[LinkedIn](#)

[YouTube](#)

[TikTok](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/653278762>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.