

Forward Financial Helps Families Prepare for the Emotional and Financial Reality of an \$84 Trillion Wealth Transfer

Guiding the next generation through legacy planning, family dynamics, and long-term financial confidence



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/EINPresswire.com/ -- As the United States enters the largest intergenerational wealth transfer in history, most families remain unprepared for what [inheritance](#) truly brings: emotion, complexity, and high-stakes decisions made under pressure. An estimated \$84 trillion is expected

“

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Bryan Walley, CEO of Forward Financial.

inheritance planning is still too often handled reactively after a major life event, during a health crisis, or following the loss of a loved one. [Forward Financial](#) was created to close this gap by helping families prepare earlier, communicate clearly, and understand the real-world financial and personal impact of inheritance before decisions are forced by crisis. The company supports

families in moving from uncertainty to clarity, reducing conflict, increasing alignment, and protecting relationships through one of life’s most difficult transitions. “Inheritance planning is rarely just about money,” said [Bryan Walley](#), CEO of Forward Financial. “It’s about relationships, expectations, and legacy. Families often assume they’ll ‘figure it out later,’ but later is frequently when emotions are highest and communication is at its lowest.”

Today, inheritance planning is growing more complicated as family and asset structures evolve. Blended families, multiple properties, business ownership, unequal distributions, and unclear intentions can quickly lead to confusion and in many cases, long-term conflict. “The complexity families face today has made early planning more critical than ever,” said Andrew Mauritzen, CFO of Forward Financial. “From assets spread across multiple states to blended households and unclear decision-making authority, it’s easy for families to fall into uncertainty. Planning early reduces stress, prevents conflict, and keeps families focused on what matters most.” Forward Financial focuses on education and early communication helping families prepare for the emotional and financial realities of inheritance and guiding them toward informed decisions.

Forward Financial helps families:

- Start the inheritance conversation early (before crisis forces decisions)
- Build clarity around expectations, roles, and responsibilities
- Invite your trusted advisors, such as tax accountants, wealth managers, and estate attorneys, so your family and team are on the same page
- Reduce conflict and confusion across family members and stakeholders

With the wealth transfer accelerating and more families encountering complex inheritance situations, Forward Inheritance is positioned to become a trusted resource for families navigating uncertainty and preparing with confidence.



About Forward Financial

Forward Financial helps families prepare for inheritance before a crisis occurs. By focusing on education, communication, and clarity, Forward Financial supports families through the emotional, financial, and logistical realities of inheritance planning, reducing conflict, improving decision-making, and helping preserve relationships and legacy.

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