

Blue Sands Wealth Highlights the Great Wealth Transfer as a Defining Opportunity for Women and Their Estate Planning

IRVINE, CA, UNITED STATES, June 17, 2026 /EINPresswire.com/ -- Blue Sands Founder Letitia Berbaum hosted the "Ladies Investing and Estate Planning" experience alongside George Berridge, Senior Wealth Advisor and Director of the Pacific Northwest at Blue Sands, in collaboration with Laura Smithman, Attorney with Alturas Law Group. The presentation, entitled "Her Legacy" was powered by RFG Advisory's StrongHer Money, and designed to show women how to help protect what they have built and shape what they will pass on.

Letitia Berbaum shared, "We're experiencing a historic moment in time. It is projected that approximately 84 Trillion dollars will change hands in the us by 2045*. A staggering 70% of that wealth is anticipated to flow through women**. Women aren't a niche audience for estate planning. They are the audience."

Addressing common myths and misconceptions about estate planning, Berbaum noted, "Estate planning is how you put your values into action over a lifetime. It's not meant solely for the wealthy, elderly or after you are gone." The presentation offered actionable next steps for women and their wealth, shedding



Letitia Berbaum, Founder of Blue Sands Wealth, Presentation on Women and the Great Wealth Transfer



Letitia Berbaum, Founder of Blue Sands Wealth, Presenting in Idaho Office

light on the consequences of having no estate plan in place, the considerations uniquely relevant to women, and strategies for transferring wealth efficiently. "Thoughtful planning today helps preserve more of what you've built for tomorrow," shared Berbaum.

Building a legacy goes beyond dollars. The most meaningful inheritances are rarely purely financial — Financial Legacy, Wisdom Legacy, and Impact Legacy form a trifecta that should be planned for collectively. [Blue Sands Wealth](#) is equipped to help women navigate this rare and consequential shift in financial power. "To the women who are looking for a strategic partner to help them curate wealth with meaning and intention, Blue Sands is ready to be your trusted guide," Berbaum shared in closing.

The "Her Legacy" presentation was held exclusively at the Blue Sands Ketchum, Idaho office. Letitia Berbaum plans to bring the presentation to the California office in the second half of 2026.

About Blue Sands Wealth

Blue Sands Wealth provides strategic investment management and legacy planning for women in transition, business owners, and families. The firm focuses on simplifying complexity and delivering clear, thoughtful guidance that aligns wealth with long-term goals and values. Headquartered in Irvine, California, the firm serves clients nationwide with a high-touch, relationship-driven approach.

Disclosures:

Advisory services offered by Investment Advisory Representatives of RFG Advisory, LLC ("RFG Advisory" or "RFG"), a registered investment advisor. Blue Sands Wealth and RFG Advisory are unaffiliated entities.

*Cerulli Associates. "Cerulli Anticipates \$84 Trillion in Wealth Transfers Through 2045." Press Release, January 2022. <https://www.cerulli.com/press-releases/cerulli-anticipates-84-trillion-in-wealth-transfers-through-2045>

**McKinsey & Company. "The New Face of Wealth: The Rise of the Female Investor." May 2025. <https://www.mckinsey.com/industries/financial-services/our-insights/the-new-face-of-wealth-the->



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