

INHERITANCE CONSIDERATIONS

We can help you navigate important financial inheritance scenarios:

- If a young adult is a beneficiary
- If you think that a beneficiary is going to squander or misuse their inheritance
- If you are retired or about to retire
- If you are the recipient of spousal rollover assets such as RRSPs, LRIFs, LIRAs, LRSPs or shares of a small Canadian corporation
- If you have received a controlling or non-controlling business interest
- If you have any real estate property that is not a principal residence
- If you have received death benefit proceeds from a life insurance policy
- If you are given the choice to take a survivor pension or a single lump-sum pension payment
- If you need to consider a testamentary or discretionary trust
- If you want to leverage the financial expertise and resources of the Raymond James team, you can request a meeting with us, yourself and the beneficiaries

Consult with your Raymond James Financial Advisor for more information.

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