

## Leaving a Legacy and Planning for the Future

You have worked hard to build your wealth, and we want to ensure your assets are protected today and tomorrow. At RLB, we help provide peace of mind with Succession & Estate Planning experts, ensuring you're planning for the future of your family and your business.

## Succession Planning

Regardless of what phase of life or business you find yourself in, you need a plan for what comes next. Succession planning allows you to take an active role in protecting the future of your business. The RLB team is focused on helping you create a successful transition to the next generation of owners.

## Estate Planning

Are you thinking ahead to the next chapter of your life? No matter the phase you're in, it's important to build a comprehensive estate plan that will protect your family, your assets, and your legacy. Our team will work with you to ensure the plan meets your wishes, the needs of your family, and is tax efficient to protect the wealth you built in your lifetime.

## Navigating the Role of Executor

Being asked to be an executor is one of the highest possible honours you can receive; however, it can require an enormous amount of work. Upon death, there are several tax returns that a taxpayer may be required to file. As experts, we understand the duties required of an executor from firsthand experience, and it's important to us that you understand them too.

Contact your RLB Advisor to get the discussion started.

