



Capitalizing on the Estate Planning *Opportunity*



The continuing transfer of generational wealth creates tremendous potential for forward-thinking advisors:

\$84.4T

is expected to transfer through 2045¹

86%

of this wealth is being passed between generations²

The older generation wants and needs advice about how to manage these transitions effectively. But research shows they aren't getting it.

90%

of those who work with an advisor view estate planning as at least somewhat important³

26%

of Americans have an estate plan³

Advisors who can engage with both the older generation and their heirs, understanding their unique needs and goals and offering advice toward those goals, are more likely to retain these assets.

¹ [Cerulli Anticipates \\$84 Trillion in Wealth Transfers Through 2045. Cerulli, January 20, 2022.](#)

² [The Next Generation of Wealth Holders in the United States 2022. Campden Wealth, 2022.](#)

³ [New FreeWill survey data: A look at Americans' views of estate planning and how it fits into overall financial planning, giving intentions. FreeWill, 2024.](#)

Learn more

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