

Legacy Life Planning Lance Expands Estate Planning Services to Meet Growing Demand for Asset Protection

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Legacy Life Planning Lance, a Johnson City-based financial planning firm, has expanded its estate planning services to address increasing demand from families seeking comprehensive asset protection and wealth preservation strategies. The expansion comes as more individuals recognize the importance of establishing clear directives for their financial legacies amid economic uncertainty and changing tax landscapes.

The enhanced estate planning services build upon the firm's existing financial planning framework, offering clients more personalized approaches to wealth transfer, trust creation, and asset management. The expansion addresses a critical gap in financial planning, as recent industry data indicates that nearly 70 percent of American adults lack comprehensive estate planning documents.

"Estate planning represents far more than document preparation?it establishes a framework for protecting everything families have worked to build," said Lance Evans of Legacy Life Planning Lance. "The expanded services allow us to provide more comprehensive solutions that address the unique circumstances each

family faces, from business succession planning to multi-generational wealth preservation."

The firm's approach to estate planning integrates with its broader financial services portfolio, including tax strategy, business funding, and retirement planning through defined benefit pension plans. This comprehensive methodology ensures that estate plans align with clients' overall financial objectives while maximizing tax efficiency and asset protection.

Legacy Life Planning Lance's estate planning services now encompass detailed trust structuring, power of attorney documentation, healthcare directives, and business succession planning. The firm specializes in working with business owners who face unique challenges in preserving both personal and business assets for future generations.

The expansion responds to shifting demographics and wealth transfer patterns. Industry analysts project that over $70 trillion will transfer between generations over the next two decades, making proper estate planning increasingly critical for families at all wealth levels.

"We've seen firsthand how proper planning can prevent family disputes, minimize tax burdens, and ensure that assets reach intended beneficiaries," Evans added. "Our expanded services provide the tools and guidance families need to navigate these complex decisions with confidence."

The firm's estate planning services complement its Infinite Banking and Index Universal Life insurance strategies, creating multiple layers of financial protection and growth opportunities. This integrated approach helps clients build tax-advantaged wealth while maintaining the flexibility to access funds when needed.

Legacy Life Planning Lance has established itself as a trusted financial planning resource in the Johnson City area, maintaining a perfect client satisfaction rating. The Black-owned firm specializes in helping business owners and professionals develop comprehensive financial strategies that encompass debt elimination, retirement planning, and wealth preservation.

The company's estate planning expansion reflects its commitment to providing accessible, comprehensive financial planning services that address the full spectrum of client needs. By combining estate planning with tax strategy, business funding solutions, and retirement planning, the firm offers a unified approach to financial security and legacy preservation.

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Legacy Life Planning Lance

Legacy Life Planning provides strategic financial planning utilizing comprehensive approaches that include full estate planning, and tackle what tomorrow brings you.

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