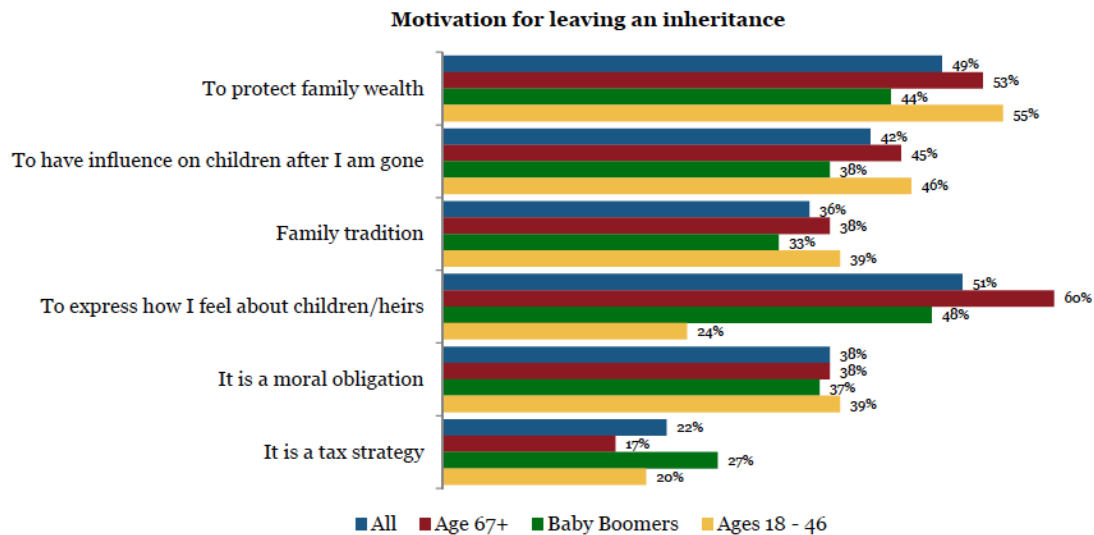


Never before has collaboration become so important in meeting the needs of high net worth clients. Faced with so much uncertainty, the most important role of the advising team is to focus on what they can help the client control today.

In the recent survey by US Trust on Wealth and Worth, it was noted that more than one-quarter of the surveyed Baby Boomers are motivated to leave an inheritance as a tax strategy. This is a very low percentage however it is not surprising.



US Trust 2012 Survey

Many professionals who are leading with the tax strategy approach will find that this approach will not work for the majority of high net worth people. Alternatively, the InKnowVision process focuses on four key elements which helps clients gain clarity in the advanced planning process.

Focus on Today

How can I protect/increase my cash flow to maintain my lifestyle needs and create a peace of mind?

How can I reduce income tax liability to compound future growth?

How can I protect what I own against lawsuits, creditors and predators?

If I become disabled what planning choices to do have?

Once high net worth clients have a peace of mind then their motivation for inheritance increases. Many from the survey stated that they wanted to leave money to protect family wealth, influence children after they are gone, carry on a family tradition, and some said they that it was a moral obligation. These reasons are more emotional than tactical. Advisors will need to their approach to a high net worth client's planning conversation.

In October, InKnowVision will be hosting its national conference to teach planning advisors how to achieve success in the high net worth space. I hope you will join us. You will find the agenda and registration here.
<http://www.inknowvision.com/institute2012.html>.

Scott Hamilton is the CEO of InKnowVision.

InKnowVision is a national advanced estate and income tax planning design firm serving ultra high net worth individuals, families and business owners.

InKnowVision delivers superior plan designs to mitigate risk and leverage opportunities while first securing cash flow and lifestyle needs.

We do this in collaboration with the client's team of professional advisors including estate and business attorneys, financial planners, and accounting firms to ensure that the client's planning goals are met.