

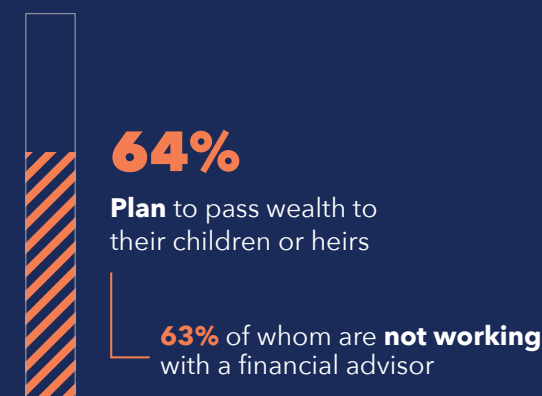
THE GREAT WEALTH TRANSFER:

Protect and Preserve Your Legacy

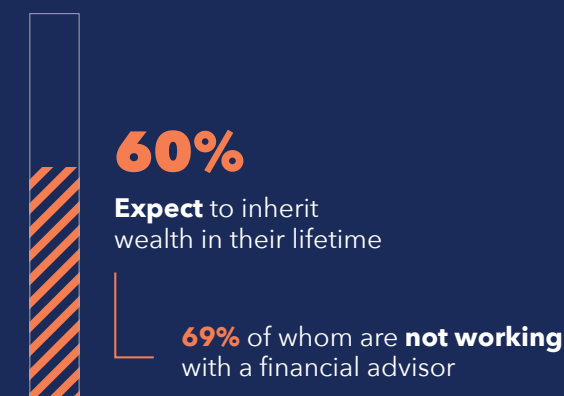
2025 MDRT U.S. Survey Results

Many Americans plan to pass down or inherit wealth, but they are missing the opportunity to protect their legacy. With trillions expected to change hands in the largest generational wealth shift in history, now is the time to plan intentionally to ensure long-term security.

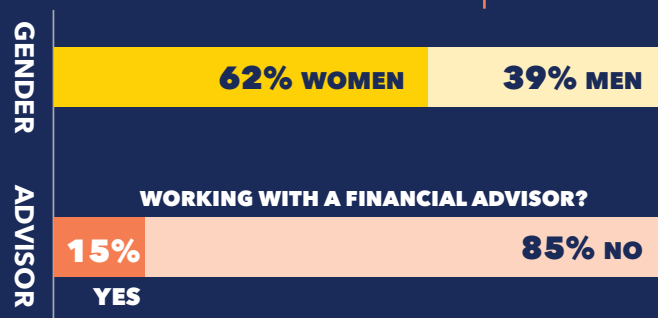
CONSUMERS AGE 60 AND ABOVE:



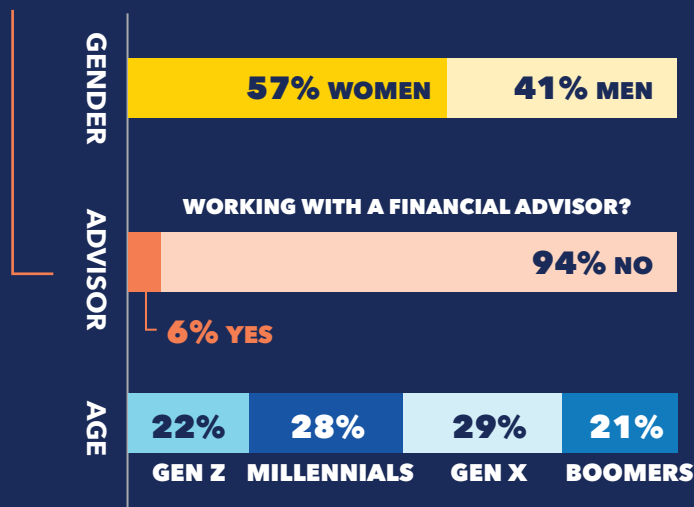
CONSUMERS AGE 59 AND BELOW:



18%
of consumers 60+ **do not believe** they have enough assets to justify creating an estate plan



45% of consumers have **not taken any action** to prepare an estate plan



Start the conversation with your advisor today to begin safeguarding your legacy.

Methodology: This survey was conducted by Opinium through a panel of individuals who agreed to take part in surveys. Fieldwork was undertaken August 4-8, 2025, with a representative sample of 2,000 U.S. consumers, weighted on age, gender, region, race, ethnicity and education according to the 2020 U.S. Census.



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