

Estate & Retirement Planning

The CARILLON GROUP can help with Estate and Retirement Planning so that you can position your assets and insurance to:

1. Enjoy a comfortable standard of living during your lifetime
2. Protect your family in the event of an untimely death
3. Direct your assets to your heirs with the least amount of taxes and expenses incurred by your estate.

For people fortunate enough to be worth more than a million dollars, estate taxes will be the largest single tax expense they will ever face. Estate tax rates range from 37% to 55%, which could reduce the value of your estate to your heirs to half of what you think it is worth. Furthermore, money in retirement plans is subject to taxes in excess of 70%. Without planning, more than half of what you've spent a lifetime building could be lost to estate taxes.