

Jonathane Ricci and JR Wealth Management Introduce Values-Based Legacy Planning Service

Jonathane Ricci and JR Wealth Management launch Values-Based Legacy Planning, aligning financial legacies with personal values and philanthropic goals.



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[Jonathane Ricci](#), CEO of [JR Wealth Management](#), today announced the launch of a new service focused on Values-Based Legacy Planning. This offering aims to assist clients in aligning their financial legacy with their personal values and philanthropic goals.

"We recognize that legacy planning is a deeply personal process," said Jonathane Ricci, CEO of JR Wealth Management. "Our goal is to provide clients with the guidance and support they need to create a legacy that reflects their core beliefs and aspirations for future generations and society."

JR Wealth Management's Values-Based Legacy Planning service includes:

- Values Assessment: Facilitating in-depth discussions and exercises to help clients identify their core values, priorities, and philanthropic interests.

Legacy Design: Developing customized legacy plans that incorporate charitable giving, wealth transfer strategies, and other philanthropic endeavors, ensuring a lasting positive impact.

- Financial Integration: Integrating legacy planning with clients' overall financial plans and investment strategies, ensuring alignment with long-term goals and aspirations.

- Ongoing Support: Providing ongoing guidance and support as clients implement and adjust their legacy plans, adapting to changing life circumstances and evolving philanthropic goals.

This new service reflects JR Wealth Management's commitment to providing clients with holistic solutions that address both financial and personal objectives, empowering them to create a legacy that aligns with their values and makes a meaningful difference in the world.

About JR Wealth Management:

JR Wealth Management is a wealth management firm that offers managed financial planning and advisory services to individuals and businesses.

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