

Anthony Pellegrino (Goldstone Financial Group) Talks about Ways to Build a Lasting Legacy Plan

Anthony Pellegrino, the founder of Goldstone Financial Group and a financial authority in the Chicagoland area recently discussed what is required to retire well.



Oakbrook, Illinois Jan 9, 2023 ([Issuewire.com](https://www.issuewire.com)) - Goldstone Financial Group and Anthony Pellegrino believe that retiring well mandates implementing solid financial planning that will have a lasting impact. Anthony has assisted thousands of clients to bridge the paycheck gap during retirement. He has helped people utilize accounts with lifetime income features to guarantee earnings and create a paycheck for life. Since Anthony offers professional asset management through a diverse portfolio of actively managed accounts and securities, he is the best person to guide in building a lasting legacy plan.

"According to studies, the traditional estate plans are 70% likely to be lost by the second generation and 90% by the third. If you have a panicked reaction to this information, you are not alone! Trust me, there's no need to start hoarding cash in your mattress, I have better ideas for you. What you have done in an estate plan can be easily incorporated into a legacy plan that will last for generations." ~
[Anthony Pellegrino Goldstone Financial Group](#)

Planning for the financial future is essential and Anthony knows it well. It is believed that retiring well requires making cumbersome arrangements and bringing up the awkward family conversation. Goldstone Financial Group's founder Anthony Pellegrino shared that building a lasting legacy plan doesn't have to be a painful procedure. Anthony has a proven track record of helping clients achieve financial success and make lasting plans that ensure that his clients can enter their golden years with ease.

Anthony Pellegrino **explained why legacy plans are so important.** He shared the following top 5 ways to build a legacy plan.

- Get the right team
- Decide what happens to material items
- Know the corporate rules
- Review your plan at significant times
- Update your will and trust

"Retiring well requires implementing a set of plans that will last. At Goldstone Financial Group we make sure to make arrangements feel less cumbersome. My motto is to help clients make lasting plans that put their loved ones at ease. I am wholeheartedly committed to making legacy plans that involve limited partnerships or corporations. I ensure my clients are following the rules for maintaining records and accounting so that when the time comes, they will be considered valid by the probate court or the IRS." ~ [Anthony Pellegrino Goldstone Financial Group](#)

The right professional advisors that specialize in legacy plans like Anthony Pellegrino can ensure your legacy plan will last for many years to come. The legacy team also consists of an accountant, a wealth advisor, and an attorney in addition to a legacy planner. It is worth looking forward to enjoying your retirement and learning that your hard work will pay off for your family and loved ones in the years to come.

About Anthony Pellegrino Goldstone Financial Group

Anthony Pellegrino, the founder of Goldstone Financial Group is honored to be recognized as a financial authority in the Chicagoland area. He has dedicated his practice not only to helping individuals plan for their financial future but also remaining by their side as a partner in achieving their desired results. Anthony Pellegrino holds a Series 65 securities license. As an Investment Advisor Representative (IAR) of Goldstone Financial Group, he provides financial strategies targeted at achieving consistent, reliable returns regardless of market fluctuations and uncertainties. As a fiduciary, Anthony has a legal responsibility to put his client's needs ahead of his own and is held to a higher ethical standard than non-fiduciary advisors.

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