

# NEWS

For Immediate Release



**Media Contact:**

Jonny Swift

Impact Communications, Inc.

913-649-5009

[JonnySwift@ImpactCommunications.org](mailto:JonnySwift@ImpactCommunications.org)

## **Junto Wealth Releases New Special Report and Educational Video Series**

*Independent Advisory Firm Provides Resources to Help Individuals Understand and Navigate Financial Challenges*

PHILADELPHIA, PA (December 16, 2020) – [Junto Wealth](#), an independent financial life planning firm located in Wayne, Pennsylvania, recently released a new Special Report called [Using Trusts to Minimize Taxes and Protect Your Legacy](#). The informational paper highlights the benefits of irrevocable and testamentary trusts and describes how trusts can make families wealthier and healthier.

“In our work with family stewards, we find that one of their biggest concerns is how to financially support a growing family over multiple generations without burdening them with all of the related financial complexities,” said Scott Pulsifer, CFA, CFP®, Managing Partner of Junto Wealth. “It is important to install protective measures and foster a positive, growing environment for your family’s wealth, and we believe trusts make families wealthier and healthier, by design. Now is the time to organize financial matters, before favorable conditions and policies change.”

In addition to the Special Report, Junto Wealth also recently launched their educational [video series](#), produced to help consumers understand and navigate common financial challenges in a bite-sized format. The videos are short and straightforward, with new ideas and suggestions centered around financial life planning, tax strategies, charitable giving, risk management, portfolio management, legacy planning, and more.

“Simply put, our calling is to help more people. It’s why we chose this profession, it’s core to Junto’s origins, and it’s the reason behind this new video series”, said

Matt Glazer, CCFC, Financial Life Planner at Junto Wealth. “Our new video blog has the goal of education on a wide range of financial planning topics, but what’s most exciting about this initiative is that it’s another opportunity for us to serve our clients and other individuals.”

Interested parties can download the special report, [Using Trusts to Minimize Taxes and Protect Your Legacy](#), and watch the educational [video series](#) on the Junto Wealth website.

## **ABOUT JUNTO WEALTH**

Junto Wealth is an independent financial life planning firm located in Wayne, Pennsylvania, working to achieve their clients’ highest return on life. Their goal is to serve as a financial friend on life’s journey, and their drive is to help their clients achieve the best possible life with the money they have. Viewing money as a means to make a life rather than using lives to make money, their greatest satisfaction in life comes from helping others fulfill their potential. Benjamin Franklin’s Junto (meaning “together”), a club he established for the purpose of mutual improvement, serves as the inspiration for their design and spirit of collaboration. Learn more at [www.JuntoWealth.com](http://www.JuntoWealth.com).

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