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HOW TO GET STARTED

While each family's situation is different, there are some planning strategies that can help you provide for your heirs and leave your legacy.

It's easy to get started. To assist you with making or updating your future plans, we can provide you with our **FREE Planning Your Legacy** wills guide. Many of our supporters have found this guide useful in helping them think through their goals.

To obtain a copy, please contact us or visit our website.



PLANNED GIVING BRIEF



YOUR LOVED ONES NEED YOU, BUT WHAT WOULD THEY DO IF YOU WERE NOT THERE?

With just a little planning you can have peace of mind knowing you have taken care of your family and secured their future.

ARE YOUR PLANS UP-TO-DATE?

One of the most effective ways to care for your family is with a current estate plan. Are your plans up-to-date? Here are some questions to consider:

HAVE there been significant life changes with your family (marriages, divorces, births, deaths, etc.) since you last updated your will or trust?

ARE you certain that your assets are properly titled, or will they be unintentionally distributed to someone else?

HOW much is “enough,” and what is an appropriate inheritance for each heir?

HOW confident are you that your heirs have the skills and judgement to wisely use inherited wealth?

WHAT else do you really desire for your heirs beyond money—college education, social responsibility, etc.?

WHAT charitable institutions have been most important to you, and do you want to include them in your plans?

A CURRENT ESTATE PLAN IS VITAL TO MAKING SURE YOUR WISHES ARE CARRIED OUT AND CAN HELP YOU LEAVE A LASTING PERSONAL LEGACY.

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