



Call or email us to request your wills guide, or to learn about other tools that we can offer you to make your planning easier.

I have reviewed your brochure and:

I would like to speak with someone who can provide additional information.

I would like to sign up for your FREE eNewsletter.

Name _____

Street _____

City _____

State/Zip _____

Home Phone _____

E-mail _____

(Please complete and return. All inquiries are treated with complete confidentiality.)

This information is not intended as tax, legal or financial advice. Gift results may vary, consult your personal financial advisor for information specific to your situation.



ESTATE PLANNING MADE EASY



Estate planning is really what you want done with what you own. The good news is, you can provide for the people and causes important to you by taking simple steps now. Creating your plan for the future can be easy and even enjoyable.



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Almost everyone feels better with a plan. It is not too complicated to complete your estate plan and achieve peace of mind. It is comforting to know when you have organized your life and your plans in a way that provides for and protects your loved ones.



While an attorney should always draft your will, we can help demystify the process and prepare you for meeting your attorney with these simple steps:

- 1** **ITEMIZE YOUR ASSETS**
Take a piece of paper and draw a line down the middle. On the left side, write something you own. On the right side, write the name or names of the person(s) you wish to receive that item or asset.
- 2** **ORGANIZE YOUR ESTATE**
Make the process of organizing your estate and plans even easier by downloading our free wills guide. This fill-in-the-blank guide walks you through the process of gathering information about what you own, your family, and your goals.
- 3** **WRITE DOWN QUESTIONS**
Consider practical questions, such as, "If I give my house to my adult son and my adult daughter, what will they do with it?" If you come up with a question that you can't seem to find a solution



- 4** **REVIEW YOUR PLANS FOR FAMILY**
You can give some assets to family right away and others over time. Ask us how you can provide an income stream or a lump sum to a loved one and achieve your personal and inheritance goals.
- 5** **CONSIDER CHARITY**
Remember to include any charities that are important to you in your plan. If you have given during life, then consider providing for these organizations through your estate. Ask us about plans like charitable remainder trusts and gift annuities that can help your family and our mission.
- 6** **VISIT YOUR ATTORNEY**
Bring the information you have gathered and questions to your attorney. Your attorney can draft a will or trust that will achieve your goals. You complete the plan through a simple signing process.
- 7** **UPDATE YOUR PLAN**
Update your estate plan as your life changes. Marriages,