



It's as easy as
completing a
simple form

How Can We Help You?

I want to know more ways to increase my giving and save money for family and myself.

- ☐ Please contact me with more information about planned giving options.
- ☐ I have already included your organization in my will.
- ☐ I already make annual gifts and would like to learn how my giving can go further.

The best way to contact me is by:

☐ E-mail ☐ Mail ☐ Telephone

Name: _____

Street: _____

City: _____

State/Zip: _____

Phone: _____

E-mail: _____

(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.



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Small Effort

BIG DIFFERENCE



Just a small effort on your part can
make a big difference to our mission

You probably already have an estate plan.

Even if you have never talked with an attorney, your estate plan likely controls most of your liquid assets.

Your Automated Estate Plan

While many people think of a will as their estate plan, a will is only part of most plans. Half of all Americans do not have a will. Creating a will may be important to ensuring the security of your loved ones after you are gone. However, some of your assets will automatically pass to your family.



A Simple Form

It's easy to designate beneficiaries for retirement assets, investments and life insurance by completing a simple form. Many forms are available online. You can also add a beneficiary to a deed for land or a home that you own.

The following is a list of assets to consider as well as the form or method by which they are commonly transferred.

ASSET	FORM OR METHOD OF TRANSFER
Retirement accounts, life insurance	Beneficiary Designation
Investment, checking or savings accounts	Payable on Death or Transfer on Death
Real estate	Joint Tenancy with Survivorship or Community Property in some states

Important Questions

Have you designated beneficiaries for your accounts? How is your property held? Even if you don't have a will, it's important to be able to answer these questions. We can help you make sure the proper designations are in place so that your plans are carried out according to your wishes.

Multiple Beneficiaries

Keep in mind that there are many ways you can pass on your assets outside of a will. You can designate multiple beneficiaries, taking care of your family and the causes most important to you. If you want to help further our mission, please consider making our organization a beneficiary in an amount or percentage of your choosing.



Contact Us

Call or e-mail us for creative ideas and resources to make your estate plan simple and effective.