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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, you can contact us or download it from 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.

WHO is dependent on you for financial support? Are you married? How many children and grandchildren do you have? Do you have any heirs with special needs?

WHAT significant life changes have occurred with your family (marriages, divorces, births, deaths, etc.) since you last updated your will or trust?

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

WHO will receive your assets? The people you intend or will your assets be unintentionally distributed to someone else?

WHAT else do you really desire for your heirs beyond

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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