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Personal

PLANNING NEWSLETTER

Fall 2022



Harvest Your Legacy



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1350 Halyard Dr. , West Sacramento CA 95691



**MAKE SURE YOUR ESTATE PLAN
HONORS YOUR LIFETIME OF
VALUES, LOVE AND FRIENDSHIP.**

HARVEST *Your Legacy*

Make sure you harvest the crops you plant. Too often we work for years but never reap the benefits of what we have sown. The fall colors and crisp, autumn air remind us of past holidays, gatherings and festivals. Harvest those memories.



The family, friends and neighbors that surround you reflect your values, your commitment and your integrity. You deserve a plan that reflects those people and causes important to you. Your legacy honors your life. Ironically, a plan that seems written for others is really for us. Your legacy is your life's harvest, and it is worthy of the small investment of time to make it work for you.



Without a will or estate plan, our harvest stays in the field. It remains unprotected and may never be enjoyed. Rather than our legacy reflecting our values and our priorities, state law will decide, shape and create our legacy for us. Do not leave your life's bounty to that near-random event.




The good news is planning your legacy is fun, rewarding and fulfilling. It can be easy. No one with a plan ever regrets having one. Take time now to write your will or revise it. Your legacy can reward and affirm your lifelong commitment and investment in the family, people and causes important to you.

We can assist you in creating a plan that works for you. Visit our website, email or call us. Your life is too important not to honor it with a fitting legacy.



**YOU HAVE PLANTED AND
LABORED YOUR WHOLE LIFE.
HARVEST THE BENEFITS NOW.**





ADD SOME DEPENDABILITY
TO YOUR LIFE WITH A
CHARITABLE GIFT ANNUITY.

Dependable AS THE SEASON

Just when you think summer's heat will not end, the days begin to shorten and the air becomes cooler. The changing of the seasons reminds and reassures us of the predictability of life. Days seem more relaxed and easier.

If you could use a little more predictability all year long, consider a charitable gift annuity. A gift annuity gives you reliable payments every year for as long as you live. No matter what happens, you can count on its payments and benefits. It is like a warm blanket on a fall evening or a cool breeze on a summer afternoon. It is there for you season after season.



WANT MORE COMFORT IN YOUR LIFE?
TRY A CHARITABLE GIFT ANNUITY.

Your charitable gift annuity will have a favorable fixed rate and will create a charitable income tax deduction this year. Part of each annuity payment may be tax-free for a few years, and there are capital gains benefits if you transfer stock to your gift annuity.

If you want to fund a charitable gift annuity, we can help you. Click on our website or email us and we can tell you what your payment rate and tax benefits may be. Like the predictability of the seasons, there is one more certainty: you will love your gift annuity.



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Easy Like a *Fall Morning*

Fall mornings are special. A light blanket or jacket is all you need. It is just one of the easiest times of year. Usually, when people think of estate planning, they think of complicated documents and multiple trips to an attorney, but like an autumn morning, some things are easy. The simplicity and joy may surprise you.

When you talk with your attorney, ask about a payable on death designation. A payable on death designation, or POD, is one of the easiest things you can do in your planning. You can use it for your checking, savings, investment and retirement accounts. By completing a simple form for each account, you can choose who receives the account when you pass away. It only takes a few moments to complete.

When you complete a beneficiary designation or POD for your accounts, you have the simplicity of:

- Changing your beneficiaries when you want
- Changing your mind as often as you want
- The comfort of knowing your accounts pass automatically at your death



Work with your attorney to make sure a beneficiary designation fits in your plan. Then ask your banker or account administrator about a beneficiary designation form. You can help the family member or charity of your choice (or both) with a simple, easy designation. You can then live every day wrapped in the comfort of knowing you have made a difference.

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