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Personal *Planning* Newsletter

Fall 2025

An Estate Plan

*for All
Seasons*



When you support your church, you can do it in ways that might bring benefits back to you that you may not expect. Here are some starting ideas that will make you feel warm this autumn.

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1350 Halyard Dr., West Sacramento, CA 95691

A Recipe for *Fall Warmth*

*Ingredients
for perfect
peace of mind.*



As fall brings cooler temperatures outside and warmer homes inside, it reminds us of holidays together, the importance of family, and the values important to us all. This season use those warm memories to help give you more peace of mind and increased comfort.

Provide for your family, friends and causes important to you, even as you take better care of yourself. Just as a recipe for the perfect apple pie brings together many ingredients, we have many tools you can mix and match to benefit yourself and those important to you, including your church. They begin with savings for you.

While we have many ingredients on our shelves to help you, here are some common ones:

Cash Back

We have tools, such as a charitable gift annuity that pays you (or you and a loved one) cash back for life, at fixed, attractive rates.



Capital Gains

We have ways to reduce your taxes when you transfer them to a trust or gift annuity, rather than selling your stock.

These are common ways we can help you. Just as there are many varieties of apples and many recipes for baking them into a pie, we can work with you to find the right recipe to accomplish your goals.

A Gift *That Pays You*



As we enter the holiday season, give yourself a gift as you support your church. This gift features many benefits, including tax savings and cash back to you, not just now but for every season as long as you live. You also support your church automatically after a lifetime of payments to you. When you fund a charitable gift annuity with us, you receive the following:



Cash Back

We pay you regularly at a favorable, fixed rate for life. The payments never change.



Bring a Friend

You can fund a gift annuity for yourself or you and a loved one.



Income Tax Deduction

You receive an income tax deduction this year for part of the funding amount.



Capital Gains Savings

Fund it by transferring stock (never selling it). Some of the capital gains are eliminated, and some are spread over several years.



A gift annuity is a wonderful way to bring yourself a little peace of mind and extra warmth this holiday season.

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Life is an *Apple Pie*

Fall was made for apples, cinnamon, butter and a little sugar. All the ingredients come together as if they were made for each other.

Life is like that pie. It combines different ingredients and bakes them together. Along the way, you have lived a fantastic life. Let us help you make your life reflect the hard work you have put into it. We have tools, ideas and recommendations that, like the ingredients in an apple pie, will come together to make your life and legacy better than ever:

- Save money on income, capital gains and estate taxes
- Simplify your estate planning to give you comfort and peace of mind
- Receive cash back in amounts that might surprise you



Our options are all free for you to explore. Call, visit our website or email us to learn how we can help create a benefit for yourself now and a greater legacy tomorrow.

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