



California-Nevada
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FOUNDATION

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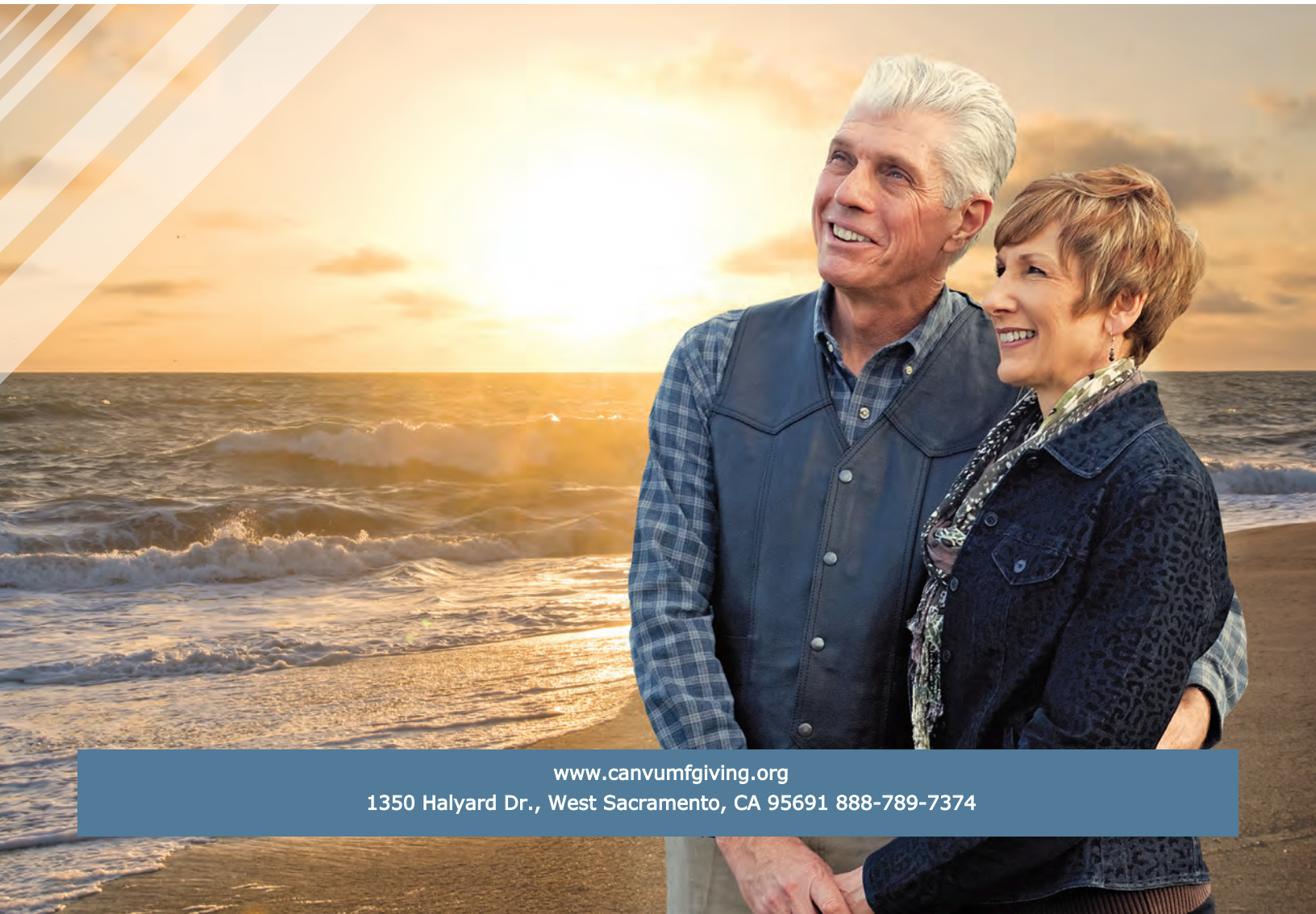
Personal PLANNING Newsletter

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Spring 2021

Let the Sunshine In



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1350 Halyard Dr., West Sacramento, CA 95691 888-789-7374



As Dependable as the Sunrise

There are few things in life as dependable as the sunrise. Did you know we can give you something that may be just as reliable and give you benefits today, tomorrow and the rest of your life? Let's shed some light on the amazing benefits of a charitable gift annuity. And like the sun rising each morning, your gift annuity payments will return to you day after day, year after year, your whole life.

Here is how it works.

- You fund a gift annuity by giving cash or transferring stock to us.
- We pay you back at a high fixed annual rate of your funding amount.
- You receive an incometax deduction this year.
- If funded with stock, you also receive capital gains benefits.

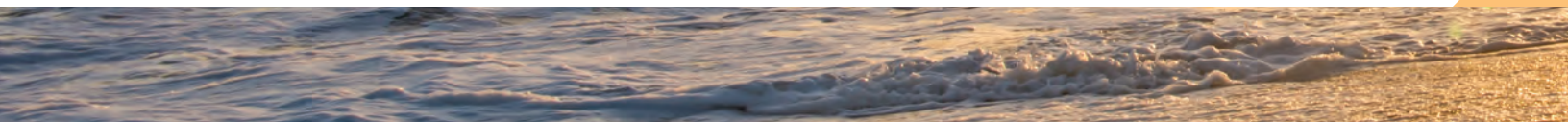
The payment you receive will never change no matter what the economy does, or how long you live.

Want some extra warmth with your gift annuity? Add a spouse or friend when you fund it, and the two-life payment will continue as long as either of you live. If you want a higher rate, you can delay the first payment and a great payment rate becomes greater.

If your life could use a little more sunshine, call or email us to learn how a gift annuity can fit into your plans. We can tell you your exact payment rate and tax benefits with no obligation, and of course, it is at no cost to you.

Would you like a little more reliability this year? Ask us about a charitable gift annuity.

You can't beat the predictable, reliable benefits of a gift annuity.



Sunshine for Every Season

The sun will rise 365 times this year. Each sunrise will be different but also the same. Some of those days will be holidays. Some, birthdays. Others will be days spent with friends, and some may be on a vacation. Yet it is always the same sun, always there to provide warmth and light.

As predictable as the sun rising, a good estate plan is there for you every day, ready for whatever happens.

If you do not have a plan, or it's been a few years since you've looked at the one you have, consider all the benefits that come from having a well-thought-out, current plan:

- You provide for your spouse, family and loved ones.
- You manage your hard-earned assets rather than them managing you.
- You maximize tax savings so you can direct more to those you love.

Best of all, when you have a plan, you have one thing that is as dependable as the sun climbing on the horizon: peace of mind. You can go to bed every night knowing you have done the right thing and no matter what happens, your plan will carry out your wishes tomorrow.

We have a free planning guide to give you a great start on creating or revising your plan. Enjoy the reliable, predictable peace of mind you so richly deserve. Don't be like many people who prefer to live in the dark and never plan.



Don't leave your family in the dark. Give them and you the light that comes from having a plan.

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What a Beautiful Day

If you have done well in the stock market, then you might be considering the tax consequences of selling your stock.

Keep the good feeling going by never selling your stock! Instead, transfer it to a charitable gift annuity or to a charitable remainder trust. You receive the benefit of the current value of the stock but also receive income tax and capital gains benefits. You should also consider making all your charitable gifts of stock, rather than cash, for the same reasons. Ask us how we can help you have a beautiful day.



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