



Making a Bequest to Charity

In considering your plans for the future, you may not only be thinking about how to help your family and save on estate taxes but also how you might benefit one or more charitable organizations. A bequest permits you to leave a lasting legacy and often provides valuable tax savings.

A charitable bequest is one of the easiest gifts to make. You can create a bequest of any dollar amount, gift specific property or designate a percentage of your estate in your will or trust plan. If you wish to make a gift of your IRA or 401(k) plan, this can usually be done by filling out a beneficiary designation form provided by your plan administrator.



How Can We Help?

- Please contact me with more information about a charitable bequest and estate planning strategies.
- I have already included your organization in my will or trust.
- Please send me your FREE estate planning guide.

The best way to contact me is by:

- Email
- Mail
- Telephone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

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.

DP-2013-58.4-cp



15010 Shell Point Blvd.
Fort Myers, FL 33908
Phone: 239-466-8484
Fax: 239-466-2069

legacyinfo@shellpoint.org

*The Future
is what you
Make
of it.*



Wills, Bequests & Trusts



Do you ever wonder what the future holds?

While it's impossible to know or control what happens in the future, you can have security about achieving your ultimate goals by making a plan.

Planning is one way to create a secure future for you and your loved ones. With a good plan, you can rest easy knowing that your family will be well cared for and your property will pass to your intended beneficiaries.

The goal of this brochure is to help you think through some of the issues to consider in future planning. Once you have identified your goals, you will want to sit down with your advisor to create a plan that reflects these goals.

FREE!

Wills Planning Guide

Using the *Guide to Planning Your Will & Trust*, you can organize what you own and state who you intend to benefit. Once your guide is completed, we encourage you to visit with your advisor to finalize your plan. Please call or email us for your FREE copy.



Why do I need a plan?

Failure to plan may result in accidental disinheritance. Accidental disinheritance occurs when you have no will or your will doesn't function properly. Because failure to plan means you risk harming those you love and subjecting your estate to needless tax, most people will need to make a plan for the future.

WHAT ARE SOME OPTIONS FOR PLANNING MY FUTURE?

A Will

A will is a written document that permits you to state how you want your property or estate distributed, name an Executor (also called a Personal Representative) to distribute your property, pay debts and taxes, and handle other business affairs to settle your estate.

Living Trust

If you own property, you may wish to set up a living trust. A living trust may be set up during life and directs where your assets go. Unlike a will, a trust will not subject your estate to probate, which is often a lengthy and costly process that requires a court to settle your estate.



WHAT OTHER CONSIDERATIONS NEED TO BE MADE?

Who will be the guardian of my dependent children?

Your child is considered a minor in most states until he or she reaches age 18. It is important to appoint a guardian, so that if you pass away, the guardian may take physical custody of and care for your minor children.

Who will have the power to manage my finances?

If you are no longer able to manage your property or later wish to have someone else manage your property, a durable power of attorney will give the person you select the legal authority to buy, sell, and manage your property.

Who will make my healthcare decisions?

A durable power of attorney for healthcare allows you to select a person who can assist your doctors in making healthcare decisions if you become unable to act on your own behalf.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.