

(This can be sent to a donor by a nonprofit organization)

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It is estimated that more than half of Americans – 56% – do not have an up-to-date estate plan.

Are you one of them?

If so, take advantage of National Estate Planning Awareness Week (October 16-20) (or, Make a Will Month in August) to evaluate where you are in your estate planning path.

Easily defined, an estate plan is a plan of action and documents to manage your assets and wishes during your life and upon your death or incapacitation. Important pieces of your plan should include:

Financial Power of Attorney – a document that lets you appoint someone (also known as your “agent”) to manage your finances and property for you if you ever become unable to do so yourself.

Medical Power of Attorney – a document that names someone (also known as your “attorney-in-fact” or your “agent”) to step in and make medical decisions on your behalf.

Revocable Living Trust – a written document that determines how your assets will be handled after you die. What sets a revocable living trust apart is that you can change or cancel the document at any time.

Will – a legally binding document that directs who will receive your property and assets.

Beneficiary Designations allow you to transfer assets directly to individuals, and sometimes charities, regardless of the terms of your will. These are most important on any financial, retirement, and life insurance policies.

Advance Healthcare Directives allow you to express your values and desires related to end-of-life care.

These critical and necessary documents should all be completed in writing, and the contents should be shared with the person, or persons, named. These individuals will need to act, possibly quickly, in the event of your death or serious injury. The documents should also be reviewed frequently and updated as necessary.

Creating – and sometimes even updating – your estate plans is difficult and sometimes a bit tedious, but it is critical. Having these documents and plans in place will offer peace of mind; not only for you, but also for the people you love and care about, during a very difficult time for them. It is also a perfect time to leave a charitable gift to the causes that matter to you. It's a wonderful legacy to leave!

While XYZ Charitable Organization is happy to offer assistance with planned gifts and helping you achieve the impact you wish to see, we encourage and recommend anyone who is interested in planned giving and/or updating their estate plans speak with their own financial and legal advisor.

FOR MORE INFORMATION ABOUT XYZ CHARITABLE ORGANIZATION'S PLANNED GIFT OPTIONS CONTACT NAME, TITLE, AT (120)456-7890, EMAIL ADDRESS. VISIT OUR WEBSITE AT WWW.XYZCHARITABLE.ORG.

XYZ CHARITABLE ORGANIZATION IS A CHAMPION OF LEAVE 10 SOUTH SOUND. BECOME A CHAMPION TODAY.



Inspiring, educating and encouraging individuals to aspire to leave at least 10 percent of their estate to charitable organizations.

www.leave10.org