

Charitable Estate Planning

An innovative approach to growing philanthropy

- Will I have enough money to live on for the rest of my life?
- How can I best benefit my heirs after I'm gone?
- Can I leave money to my favorite charities?

The Winona Health Foundation knows these questions concern most of us. We also know that the answers are as individual as the person who asks them. That is why the Winona Health Foundation has contracted with Thompson & Associates, one of the most respected charitable estate planning firms in the country, to provide charitable estate planning services to our benefactors and friends—at no charge.

For more information on the Winona Health Foundation's Charitable Estate Planning Service, contact the Winona Health Foundation at 507.474.3328 or email nbrown@winonahealth.org.

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If estate planning is on your back burner, you are not alone. Seventy percent of adult Americans do not have an estate plan, and of those who do, many have not revisited their plans despite significant changes in their life circumstances.



Estate plans are not just for the wealthy. Everyone needs a plan and unfortunately, procrastination in such matters can have dire consequences.

You have probably heard stories about families torn apart by money conflicts after a parent's death or about inheritances significantly reduced due to estate taxes. It doesn't have to be that way. A thoughtful and well executed estate plan can avoid such pitfalls.

With charitable estate planning, people see how advantageous it can be to include their favorite charities in their estate plans. After working with a Thompson & Associates expert, you may be delighted to find you can be more generous to your heirs and your favorite charities than you ever dreamed possible.

Let us show you how.

Is Charitable Estate Planning for you?

It is if you would you like to:

- Maximize your family's inheritance
- Minimize taxes and other costs
- Shift tax dollars to charity without reducing the benefit to your family
- Positively impact your community and those served by the charities that benefit from your generosity

What Charitable Estate Planning can do for you:

- Review any current will or estate plan you have in place
- Help you clarify your values
- Help you quantify your assets
- Educate you about your options
- Provide you with recommendations
- Ensure your understanding
- Assist you with implementation
- Work with your attorneys and advisors at your request

The Charitable Estate Planning process:

- Initial meeting is arranged privately with our Charitable Estate Planner via the Winona Health Foundation
- Values and objectives are clarified
- You decide whether to continue the planning discussions
- Information is gathered over several meetings (typically 3-6)
- Comprehensive charitable estate plan is recommended
- Plan is implemented in conjunction with your attorneys and advisors

What the Charitable Estate Planning process does not do:

- Charge you a fee
- Sell you any products
- Manage your money
- Draft your documents
- Divulge your information
- Obligate you in any way