



*Tuesday, April 12, 2022*

We spend our lives working hard, building relationships with family and friends and trying to leave a legacy worthy of the lives we lived. Yet most Americans don't do one simple thing: write a will. Almost 2/3 of all adults have no will. Don't be one of them.

When you think of all the investments you have made:

- in family and friends
- in work
- in hobbies
- in service to others

Most people think a will is about the things we have and where we want them to go. While a plan does include "things" and directs where they should go, it is much more. Those who have a plan will tell you it was less about what they owned and more about what impact they wanted to have on others' lives.

Here is what many people say when they create their plan:

- We did not know how easy it would be.

- We thought we would be talking about death, but we really were talking about life. It was actually enjoyable and energizing.
- We live every day with comfort knowing we have planned our legacy and are prepared for whatever may come.

Best of all, we make it easy for you to create or update your plan. We have a complimentary estate planning kit you can download, or we will mail it to you. It helps you organize your plan in simple, understandable terms. You may even save attorney fees (although estate planning is usually less expensive than most people think) because some of the preparation is already done.

For more information and our step-by-step estate planning guide please give us a call at [718-965-7375](tel:718-965-7375) x1616 or reply to this e-mail. To help ensure your will and estate plan reflects your desires, you may also view some helpful videos on our planned giving website –[www.cfbqlegacy.org](http://www.cfbqlegacy.org).

*This information is educational in nature. It is not offering professional tax, legal, or accounting advice. For specific advice about the effect of any planning concept on your tax or financial situation or with your estate, please consult a qualified professional advisor.*



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## PERSONAL PLANNER

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Bill and Alice started their family business many years ago. The early years were very challenging. Both worked without salary and it was a great struggle to finally get the business on a solid financial base.

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I will be 65 and eligible for Medicare in a few months. I am interested in getting a Medicare Advantage plan to cover my health care and medications. What tips can you provide to help me pick a plan?

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Several years ago, Larry and Allison invested \$30,000 in what they believed to be an attractive stock.

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With tax return backlog and millions of taxpayers waiting for refunds, the Internal Revenue Service (IRS) announced a plan to hire 5,000 new staff. This poses a challenge due to the stiff hiring competition and a tight job



market.

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## FREE ESTATE PLANNING GUIDE

It's never too late to plan for the people and causes you care about. Our easy-to-use estate planning guide can help you gather the information you need before meeting with your attorney.



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Use our online calculator to view the tax and income benefits of making a gift to support our cause. This can help you determine the best plan to meet your needs and goals.



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