



Wednesday, August 31, 2022

Whether you realize it or not, you likely already have an estate plan.

While everyone should talk with an attorney about a formal plan, there are assets you own that will automatically transfer to your heirs.

Small Steps

You can take some small steps today to ensure your loved ones are well cared for after you are gone. You can:

- Name beneficiaries for your retirement plan assets and life insurance.
- Designate Pay on Death or Transfer on Death beneficiaries for your investments, checking or savings accounts.
- Review and update your real estate and vehicle titles to include your beneficiaries.

Multiple Beneficiaries

Keep in mind that there are many ways you can pass on your assets outside of a will. You can designate multiple beneficiaries, taking care of your family and the causes most important to you. If you want to help further our mission, please consider making our organization a beneficiary in an amount or percentage of your choosing.

A Few Moments

You already have an estate. It only takes a few moments to make it work for you. Please contact us for free resources and assistance with planning your future.

For more information and our step-by-step estate planning guide please give us a call at [718-965-7375 x1616](tel:718-965-7375) 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.

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.



Endowments



How to Give



About Bequests

PERSONAL PLANNER

Chronic Illness - Care of Your Person

If you have a chronic illness, your personal planning will need to involve careful consideration of your condition. Many Americans experience ALS disease, Alzheimer's, Huntington's disease, Parkinson's disease, multiple sclerosis (MS) or other types of...

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Last year I received a "notice of change" letter from my Medicare provider. Should I expect another one this year?

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DONOR STORY

[Part Gift and Part Sale](#)

Susan and Kevin bought a vacant lot along Lake Michigan many years ago. They had planned to build a second home so that their family could spend their summers along the lake.

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WASHINGTON NEWS

[Federal Student Loan Relief Plan](#)

This week, the President announced a plan to reduce the student loan balances of approximately 43 million individuals. White House discussions have been ongoing for several months and under the American Rescue Plan Act of 2021, this cancelled debt will not be...

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Thank you for your interest in planned giving. To access any of our resources, please go to our [website](#).

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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