



Wednesday, February 16, 2022

An Olympian trains for years for the momentary thrill of crossing the finish line and winning the gold. You can spend what amounts to a moment to produce years of ongoing fulfillment and satisfaction. Think of the joy and happiness you will receive for completing your estate plan.

As you think about your plan, here are some of the more common tools for you to think about:

- **BEQUEST**—the most common and powerful tool. You can use your will to list the people and causes important to you and direct almost any assets you have to them.
- **BENEFICIARY DESIGNATION**—like the transitions in a triathlon, this one is often overlooked but can play a pivotal role. Consider naming family, friends and causes as the beneficiary of your IRA, 401(k) or investment account. The transition happens almost automatically, is not part of your will and is often done by completing a simple form.
- **TESTAMENTARY CRUT**—A testamentary charitable remainder unitrust or CRUT is a trust created in your will that does special things. The trust pays each year at a rate you choose to the people you choose for as long as you choose. After the trust ends, all remaining funds go to the charity you support, which provides your estate with significant tax savings.

Let us help you, and if you want more information on the bequest, beneficiary designation or testamentary CRUT, or any of several other helpful ideas, let us know. We want to see you celebrate and finish well.

Call or email us for our FREE tools and Estate Planning guide. It will help you prepare your plans. We can't run the race for you, but we have helped others train and complete their plans, and we can make it easy and rewarding for you. You can finish your life's Olympic race with grace, poise and satisfaction, and we are here to help.

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.

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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