



Wednesday February 2, 2022

There is something we can learn from the triathlon even if we have never run a race. Any competitor will tell you that to finish well, you have to have a plan, and that plan has three parts: 1. Commit 2. Prepare 3. Complete

While a triathlete can be finely tuned and train for life, he or she may still only come in second place. Unlike the triathlete, we don't have to train, and there are no sacrificial diets or exercise regimens. The cost for having an estate plan is minimal compared to the investment a triathlete makes, but the rewards are remarkable.

TRIATHLETE PREPARING FOR A RACE	YOU PLANNING YOUR ESTATE
Preparation and training often pay off in the end.	Preparation and training always produce a sound plan.
Trains every day for years for a race that lasts a short time.	Meet a couple hours with an attorney for results that last years.
Formula for victory: commit, prepare, complete.	Formula for victory: commit, prepare, complete.

Like the triathlete, the first step in estate planning is always the most difficult: STARTING. To help you begin and even give you a head start, we have free tools that make getting started easy. Once you have them and use them, you have already completed step two—preparation. You are 2/3 of the way to victory! The final step is easiest—completion. It comes when your attorney combines your preparation into a solid, thoughtful plan that follows and preserves your wishes. What could be easier or more rewarding than that?

Call or email us and ask us for our free, no-obligation tools we have for you.

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.



Endowments



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PERSONAL PLANNER

['Give It Twice' Trust](#)

A very popular option for a parent with children is called the "Give It Twice" trust. This is a trust funded when the surviving parent passes away.

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[Tax Breaks for Family Caregivers](#)

Are there any tax breaks that you know of for family caregivers? I help financially support my 82-year-old mother and would like to find out if I can write any of these expenses off on my taxes.

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[Endowment Gift](#)

Pat and Shelly were recently married. They both had been dedicated volunteers at their favorite charity for many years.

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WASHINGTON NEWS

[Tax Filing Season Opened January 24](#)

In IR-2022-18 the Internal Revenue Service (IRS) announced that it has opened tax filing season for this year. The IRS reminds taxpayers you should use best practices to file an accurate return and receive a prompt tax refund.

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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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