



Wednesday January 5, 2022

This year forget the resolutions. It is a new year, and it is time for a fresh look at your future. Most people feel they cannot control the future, so they never try. The reality is the future is what we make it.

If you want:

- A year with reduced taxes, we can help you
- Favorable payment rates to you for life, we can help you
- To provide for your family and causes important to you, we can help you

We have plenty of tools and ideas to help you make this year and your future be what you want it to be. These ideas can give you a way to increase income while also saving significant taxes.

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 with "Estate Planning" as your subject. 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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Elliot and Alexis were concerned about planning for the future. They had built a substantial estate of \$1,200,000. When Elliot was 70, he rolled over his \$400,000 qualified retirement plan into an IRA. Because he is now over age 72, Elliot is taking...

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Can you provide some tips on how to be protected from financial scams? My 76-year-old aunt was recently swindled out of \$25,000 and I want to make sure my own mother is protected.

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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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PLANNED GIVING CALCULATORS

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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