



Wednesday, July 20, 2022

Food for Thought - Plan for Your Future Like You'd Shop for Healthy Foods

A good list

Any trip to the store is better when we plan ahead. When we make a shopping list first, we usually buy only what we need and are less prone to impulse purchases. By planning ahead, we can time our trip with good sales, coupons and flyers so we can get what we need at the best price. Planning pays.

This is a wonderful opportunity to look at ways to save taxes. As you do, you can also look ahead and ensure future years provide enough for you, your family and the causes you cherish. And, when all is added together, you will leave a legacy and be remembered for all you have done.

We help people like you every day and we have excellent planning tools to help you achieve your goals. You would not go to the store without knowing what you want. Don't live another day without thinking about your future and that of your family. We have fresh ideas to help you.

As you take time to spend with your family and friends this summer, consider how you want to provide for them even as you save money for yourself and your spouse. If you wish to include our mission in your plans, we have tools to help you provide for your family while giving you significant tax benefits. We have

everything you need, and unlike the store, all our tools are available at absolutely no cost (or obligation) for you. No coupon is ever needed.

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

Helping Children Tomorrow

Parents and children often have a different perspective on saving and spending. Parents of retirement age today were born during the 1940s or 1950s and have a strong desire to save and invest in order to increase economic security.

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SAVVY LIVING

[How to Find and Claim Your Family's Forgotten Assets](#)

I read an article about online tools that can help people search for lost or forgotten money left behind by their deceased relatives, can you help explain more?

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DONOR STORY

[Peace of Mind Gift Annuity](#)

Many years ago, Clara bought a home. Since she was very pleased with her home, she bought stock in the company that built the home.

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WASHINGTON NEWS

[Federal Trade Commission Webinar on Scams and Identity Theft](#)

The Federal Trade Commission and the Internal Revenue Service plan to sponsor a free webinar on Wednesday, July 20 at 2 p.m. Eastern Time (11:00 a.m. PT, 12 p.m. MT, 1:00 p.m. CT). The free webinar will help taxpayers understand potential tax scams and...

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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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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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