



Wednesday, July 27, 2022

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

Ever wonder why the store puts the milk, eggs and other staples along its back wall? They place them there because they know those are the products you need most often. The grocer wants you to impulse buy the other products you see as you walk to the back of the store.

While we don't sell milk and eggs, we do have tools and ideas to help you and make your life better. However, we put our staples and everything you need up front. We value your time and want to give you our best, conveniently and with no clutter. We make it easy for you.

While we offer many tools, tips and ideas, here are a few of our ideas to show how impactful but quick and simple planning can be.

- Think about your pay-on-death beneficiary for your checking, savings, IRA and investment accounts. You can designate a family member or charity to receive funds in the account without going through probate.
- Our charitable gift annuity offers you high, fixed, reliable payments that last your whole life.

Call or email us. We give you our best ideas right out front. You never have to search. Imagine the peace of mind you will have.

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

Integrity and Initiative

Pat and Allen were talking about their three children. They are empty nesters and the three children are off making their way in the world.

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SAVVY LIVING

[Should You Take Daily Aspirin for Your Heart?](#)

I have been taking daily aspirin for almost 20 years now due to a family history of heart disease. I recently read that using aspirin is not recommended anymore. Can you tell me about this change in philosophy?

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DONOR STORY

[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

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With inflation running at the highest levels in several decades, Members of Congress are concerned about adjusting taxpayer credits and deductions to account for the soaring inflation. Senator Chuck Grassley (R-IA) has been a leader in proposing...

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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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