



## PLANNED GIVING NEWSLETTER #11: NOVEMBER 2019

Because we have seen the consequences of people not having an estate plan, United Way of Pickens County is providing this newsletter as a service to our faithful supporters.

This quarterly newsletter provides information about the various components of an estate plan. We hope that you will use this information to consider how your estate plan can provide for your family, reduce your tax burden, and support charities that you have supported during your lifetime.

It is not intended to provide legal or financial advice. Please seek the help of an attorney or financial advisor before making an estate plan.

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### HELPING HIS NEIGHBORS IN NEED...THAT WAS DAVID MCDANIEL.

David McDaniel of Easley has been described by a friend as a “private man with a big heart.” Edwina Jackson, co-executor of his estate and special friend said that “he was a quiet, friendly man who did more listening than talking...unless the conversation was about Clemson or horses.”

United Way of Pickens County dedicates our November newsletter in honor of David McDaniel: an amazing individual who left a significant gift through his estate to help those in need in Pickens County.

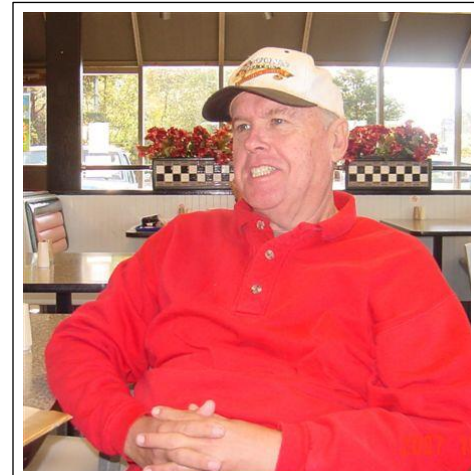
David was born in Pickens County, and resided there all his life, except for his time in the Army. A Viet Nam War veteran and Clemson graduate, McDaniel spent most of his life living on the family farm located between Easley and Liberty. McDaniel was a Christian, who loved Pickens County and its people. For 20 years, he owned and operated McDaniel Implement, a farm implement and parts company.

Dr. Jim Mullikin, a long-time friend and co-executor of his estate, said that they became close friends when David moved his business across the street from Jim’s office. “David was a quiet, private person, and appeared to know everyone in Pickens County. We had many memorable occasions, which included doing veterinary work on his horse, and attending Clemson football games,” said Mullikin.

When David realized his illness was probably terminal, he began telling Mullikin what he wanted done with his estate. One of his wishes was to help those less fortunate in Pickens County.

“We are so thankful for David McDaniel’s generous commitment to help his neighbors in need,” said Julie Capaldi, President of United Way of Pickens County. “As we learn more and more about Mr. McDaniel, we realize that he was a visionary man, whose final act in life was to provide resources to help others. It’s symbolic that his gift will live on and on through our endowment fund, helping those who struggle to access food, shelter, and health care. Imagine the lives that David’s gift will touch in perpetuity!”

“I wished I could have hugged him to express our THANKS for his extraordinary generosity,” said Capaldi. “We are overwhelmed with gratitude!”



David McDaniel



McDaniel’s executors (center): Edwina Jackson and Dr. Jim Mullikin, along with Larry Pope (left) and Mark Eisengrein (right) of UW of Pickens County.

### ARE YOU ONE OF THE 60 PERCENT?

Having a will is one of the things that you know you should do – but according to a recent survey by AARP, only 4 in 10 Americans actually have a written will.

It's true...over 60 percent of Americans do not have a will. In a recent article, Legal Zoom offers some common excuses for not having a will:

1. **It's uncomfortable telling strangers about your personal details:** Many people are reluctant to discuss their personal affairs with strangers (attorney, accountant, financial advisor), so we avoid it.
2. **You're not ready to make important life decisions:** If you think your will has to be the "be all, end all" document and you're just not ready to make such huge and overwhelming decisions, think again. A will is something you create for right now—not for some nebulous time in the future—with what you currently have. All you have to do in the future is revise your will. The best part is, once you've made your first will, the next one becomes much easier.
3. **We avoid dealing with family issues:** Not wanting to deal with family issues is a big reason a lot of people don't take the time to create their will. Having to confront issues of the past can be extremely uncomfortable, and even a flash point for a current relationship. Issues with a blended family, past relationships, a special needs child, or an addicted family member often seem unresolvable, and therefore we avoid them.
4. **Belief that it takes too much effort:** Everything takes some effort—especially anything worthwhile. Yes, it takes some effort, but you will have a great feeling knowing that your wishes are written and will be implemented whenever that day arrives.
5. **Belief that only wealthy people need wills:** The idea that only wealthy people need wills is simply not true. Whether you're old, young, rich, poor, male, female, married, single, childless or you have children, everyone needs a will. More than likely, you have property and personal possessions that you would want to go to specific people. Putting it all down on paper is a gift for your surviving family and friends, and it is the smart thing to do.
6. **Belief that young people don't need wills:** You're never too young to start planning for the inevitable, including college-aged and young adults.
7. **Belief that it's something we "should" do:** Typically, when people feel that they "have" to do something, the opposite occurs, and they avoid it. It's often the same with creating a will.

#### **UNSURE OF WHERE TO START? HERE'S A FREE WILL OPTION, COMPLIMENTS OF UNITED WAY.**

Some people don't know where to start in creating a will, and therefore never take the next step. United Way of Pickens County now offers our supporters and their spouses an opportunity to create a **WILL**, thanks to our partnership with United Way Worldwide. And the best news is...it's **FREE!**

To create your **FREE WILL**, go to: [www.freewill.com/will/getstarted](http://www.freewill.com/will/getstarted) to utilize the online guide that will step you through the 20-minute process. Be sure to print a copy of your **FREE WILL**, sign it, and have a couple of people witness your signature, thus making it official. And don't forget to place your original, signed will with your other important legal and financial documents, in a place where family members can find it one day. You may want to give a copy of your official will to anyone whose name is listed in your will.

Once your **FREE WILL** is official, we recommend that you have a local attorney review the contents of your will, so that it complies with all your wishes.

Finally, we want to invite you to make a final gift to United Way of Pickens County through your **FREE WILL**. It's an easy way to give from your remaining assets, and it will allow you to support those in need in our community for generations to come through our Endowment Fund.

Please contact Mark Eisengrein, 850-7094, ext. 108 with any questions that you may have about **FREE WILL**.



You can help those in need in our community by pledging an estate gift to United Way of Pickens County. Unless otherwise indicated, your gift will live on and on in our Endowment Fund, helping those who struggle to access food, shelter, and healthcare. And you will be recognized as a member of the **Heritage Society**, a group of likeminded individuals who have made plans to support United Way of Pickens County through their estate plan. If you would like to discuss how to help those in need for generations to come, contact Mark Eisengrein at 864-850-7094 ext. 108 or email him at: [meisengrein@uwpickens.org](mailto:meisengrein@uwpickens.org)