

PLANNED GIVING NEWSLETTER #2: SUMMER 2017

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

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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### A WIN-WIN-WIN-WIN SOLUTION!

Recently, I read the following quote: “When I die, I want someone to update my Facebook page occasionally, just to freak people out.”

Ok, that’s funny. But let’s face it, death is a morbid subject. We make every effort to not discuss our demise with our spouse and family. A friend once told me... “Mark, I don’t want to talk about my death, because it doesn’t affect me. Remember, I’ll be dead.” I couldn’t disagree with this gentleman more.

Yes, death is final. But your death doesn’t need to be a lose/lose proposition. Here are several ways that your inevitable passing can turn into a win-win-win-win solution for you, your family and our community:

**WIN #1:** You can provide a wonderful gift to your spouse and family by planning for any future healthcare issues. “Five Wishes” is an excellent pamphlet that describes five important healthcare decisions that everyone will need to make in their lifetime. And it contains a copy of the appropriate forms for you to complete. The following is a summary of the five wishes:

- #1. My wish as to the person that will make healthcare decisions for me when I can’t make them for myself.*
- #2. My wish for the kind of medical treatment that I want or don’t want in the end of life.*
- #3. My wish for how comfortable I want to be in the end of life.*
- #4. My wish for how I want people to treat me in the end of life.*
- #5. My wish for what I want my loved ones to know about me after I’m gone.*

The “Five Wishes” forms take about an hour to complete, witness, and notarize. Once completed, you’ll have a great feeling knowing that you have adequately planned for any future healthcare issues.

**WIN #2:** You can help your spouse and family members by compiling important documents (such as your will, bank account statements, investments, insurance policies, safety deposit box key, list of online passwords) in an easy to find notebook. Here again, a couple of hours of thoughtful planning can save your spouse and children from the painstaking effort of documenting your life and assets after you're gone. What a wonderful gift to give your grieving family.

**WIN #3:** You can help your spouse and family members by detailing your funeral wishes. There are numerous decisions that family members have to make regarding your funeral, such as burial or cremation, the specifics of your funeral service, the people that need to be contacted, and your obituary notice for the local newspaper. As you make thoughtful plans for your funeral, you will be relieving your family members of the difficult task of deciding your funeral preferences.

**WIN #4:** You can support our community upon your death. Many folks choose to make a final gift to a charity that they have supported throughout their lifetime. Some people choose to endow their annual support in perpetuity. A thoughtful final gift is a wonderful way for you to "live on" in support of our community for generations to come.

There are other important documents that state and federal laws require regarding estate planning. It is important, therefore, to consult an attorney to ensure that your wishes are properly documented.

Death doesn't have to be your final statement. Through careful planning, your estate plan can be a win-win-win-win solution for your spouse, family members and our community.

### **A FREE COPY OF "FIVE WISHES"...HOW CAN I GET ONE?**

United Way of Pickens County has a limited number of "Five Wishes" pamphlet. To receive a free copy, please send an email to: [meisengrein@uwpickens.org](mailto:meisengrein@uwpickens.org) or call (864) 850-7094, ext. 108.

### **A FREE "LUNCH AND LEARN" ON ESTATE AND FUNERAL PLANNING...WHEN?**

You are invited to a free **"Lunch and Learn" on Thursday, Oct. 5<sup>th</sup> from 11:45-1:30 PM**, at South & West, 109 South 1st Street in downtown Easley. Richard Jones, Jr. and Ginger Phillips, estate planning attorneys with Dobson, Jones, Ball, Phillips & Bridges, PA in Greenville will be sharing information about a simple will, a durable power of attorney for financial management, a living trust, and charitable giving. In addition, a representative from Robinson Funeral Home will be discussing the importance of preplanning a funeral. A limited number of spaces are available, so please make a reservation by Oct. 1<sup>st</sup> to Barbara Center at 864-859-7094 or by email to: [bcenter@uwpickens.org](mailto:bcenter@uwpickens.org).

You are invited to join the *Heritage Society* by planning an estate gift to help support the ongoing mission of United Way of Pickens County. You will be joining other likeminded individuals who have made plans to support United Way through their estate plan. A planned gift is a perfect way to help support needy children and families in Pickens County in perpetuity. And, you will be inspiring others to join you in support of our mission. If you would like to discuss how you can make a legacy gift to United Way of Pickens County through your estate plan, contact Mark Eisengrein at 864-850-7094 or at: [meisengrein@uwpickens.org](mailto:meisengrein@uwpickens.org).