

**PLANNED GIVING NEWSLETTER #35: March 28, 2025**

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.

Provided quarterly, this newsletter contains 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 a local attorney or financial planner before making an estate plan.

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**5 ESTATE PLANNING TIPS WHEN YOU DON'T HAVE CHILDREN**, by Legal Zoom

"Some child-free folks may believe estate planning is not necessary if they don't have a family to worry about. Or they may believe that 'getting their affairs in order' is a complicated, stressful sea to navigate.

Having a comprehensive estate plan in place is important for everyone, regardless of whether you have children or heirs, or you don't believe you have a lot of money or possessions to bequeath. A last will and testament is a written document that provides for the distribution of a deceased person's real and personal property. If you die without a last will and testament, South Carolina laws determine what happens to your property...and that may not align with your wishes. Here are 5 tips for compiling your estate plan when you don't have children:

- **Who do you want as your executor?** One of the most important decisions you will make for your estate plan is who you choose as executor of your will. The executor is the person who will carry out the provisions of your will, so it should be someone you feel is capable, responsible and willing to serve.
- **Who do you want to step-in and make decisions on your behalf?** Perhaps even more important than choosing an executor is deciding who you would like to represent your interests, both financially and medically, should you become incapacitated. This should be someone you trust implicitly to follow your wishes and to make tough decisions or to advocate on your behalf.
- **Who do you want to get your stuff?** Take an inventory of your real and personal property, and make a list of family & friends you would like to inherit something from you.
- **Are there Charitable Organizations you support?** Many people without children or heirs leave money to their favorite charities when they pass. It may be more tax-advantageous to do so during your lifetime in order to maximize deductions. You can even set up a Charitable Trust with funds to be distributed to the charity of your choice over time.
- **Are your pets provided for?** Your pets are probably like family to you, so you will appreciate the peace of mind knowing they'll be okay once you're gone. Aside from choosing someone to take possession of them, you can also put money in a trust earmarked for their care."

No one knows what the future will bring. Having an estate plan will help you ensure that your wishes will be followed in the event of your untimely death or incapacity. Reach out to a local estate planning attorney to discuss these ideas. If you don't have a local attorney, United Way of Pickens County has partnered with Michelle King of Merline & Mecham Attorneys in Greenville (864-242-4080). She will be happy to meet with you, discuss your ideas and help create your estate plan.

**FIVE WISHES...A FREE PUBLICATION TO HELP YOU DOCUMENT YOUR END-OF-LIFE WISHES**

**FIVE WISHES** is a national advance care planning document created over 25-years ago by Aging with Dignity. Described as the "living will with a heart and soul", **FIVE WISHES** is a unique approach to estate planning that supplements the traditional legal documents by addressing personal, emotional, and spiritual needs, alongside

the medical and legal decisions. More than 40 million **FIVE WISHES** documents have been distributed worldwide.

Why choose **FIVE WISHES**:

- It's written in everyday language, making it easy to understand and complete.
- It covers personal, spiritual, medical and legal wishes all in one document.
- It allows your family or caregiver to know exactly what you want, so they don't have to guess.
- It is a great supplemental document to provide additional guidance to family & friends.

**FIVE WISHES** addresses the following areas:

- Who you want to make healthcare decisions when you're not able to.
- What kind of end-of-life medical treatment that you want or don't want.
- How comfortable you want to be made at end-of-life (pain management, environment).
- How you want to be treated by people at end-of-life (visitation, companionship).
- What you want your loved ones to know about you (messages, personal wishes).

United Way of Pickens County is offering our supporters a free copy of **FIVE WISHES** by emailing Mark Eisengrein at [mesiengrein@uwpickens.org](mailto:mesiengrein@uwpickens.org) or by texting your name & address to Mark at 864-593-6192.

## **HERE'S A UNIQUE WAY TO SUPPORT UNITED WAY OF PICKENS COUNTY: MAKE A FINAL GIFT IN YOUR WILL**

A simple way to support United Way of Pickens County is to make a "bequest" or a final gift in your will. Anyone can make a bequest—in any amount—to any charitable organization. Here are some ways that you can make a bequest to United Way of Pickens County in your will:

- **Specific Bequest:** "I hereby give, devise and bequeath \$\_\_\_\_\_ upon my death to United Way of Pickens County (a nonprofit organization located at 201 South 5th Street, Suite 212, Easley, SC 29640, Tax ID# 57-0476249). I request that this estate gift be deposited in their Community Enrichment Fund, where funds are conservatively invested in perpetuity, and only a portion of the annual earnings may be used to support those in need in Pickens County."
- **Percentage Bequest:** "I hereby give, devise and bequeath \_\_\_\_ % of my total estate upon my death to United Way of Pickens County (a nonprofit organization located at 201 South 5th Street, Suite 212, Easley, SC 29640, Tax ID# 57-0476249). I request that this estate gift be deposited in their Community Enrichment Fund, where funds are conservatively invested in perpetuity, and only a portion of the annual earnings may be used to support those in need in Pickens County."

Once your will is finalized, it is important to communicate your charitable intentions with your family members and other beneficiaries and charitable organizations.

## **YOU'RE INVITED TO OUR HERITAGE SOCIETY'S WINE TASTING ON MAY 1 AT VICTORIA VALLEY VINEYARDS AT TABLE ROCK**

Please mark your calendar for Thursday, May 1 from 6-8:30 PM, when members of the Heritage Society and supporters of United Way of Pickens County will gather at Victoria Valley Vineyards at Table Rock ([victoriavalleyvineyards.com](http://victoriavalleyvineyards.com)), 1360 S. Saluda Road in Cleveland, SC. Join us for hors d'oeuvres, winetasting, and fellowship with supporters of United Way of Pickens County. Come and learn more about the Heritage Society, and how you can make a lasting impact on our community. To RSVP or to receive more information about this event, simply email Mark Eisengrein at: [meisengrein@uwpickens.org](mailto:meisengrein@uwpickens.org) or text Mark at 864-593-6192.



You are invited to join the **Heritage Society** by pledging an estate gift to United Way of Pickens County. Unless otherwise indicated, your final gift will "live on" in the Community Enrichment Fund helping those who struggle to access food, shelter, and healthcare in our community. And, you will be supporting United Way of Pickens County's bold goal that 70% of 3<sup>rd</sup> graders read at grade level. **Heritage Society** members gather annually to welcome new members, and to hear an update about the work that their annual support is making possible. If you want to help Pickens County residents in need for generations to come, simply contact Mark Eisengrein at 864-850-7094 ext. 108 or email at: [meisengrein@uwpickens.org](mailto:meisengrein@uwpickens.org)