



Gift Planning Services LLC

PLANNED GIVING

“True wisdom is knowing what you don’t know” -Confucius

Where will your assets go?



Your Heirs



Uncle Sam



Charity

Motivate

Information Gathering
Plan Development

Educate

Binder Delivery with Advisor

Facilitate

Work with Advisors to Complete all Documents

- Attorney
- CPA/Accountant
- Advisor
- Others...

We show you how to:

- Leave MORE to family in a way that will help and not harm.
- Leave MORE to charity than you ever thought possible.
- Avoid paying unnecessary taxes.

We provide in-depth information on a wide variety of charitable vehicles and estate planning tools to help you maximize your gifts to family and charity. By working collaboratively with your advisor, we hope to create more educated consumers, thereby allowing you to save money on the drafting of your plan.

Gift Planning Services LLC

(715) 838-0368

HCL@giftplanningservices.com

A PLAN FOR THE FUTURE

Leave a Legacy

What's Included

- Information gathering by Gift Planner/Advisor.
- Review of current plan by Gift Planning Services, LLC.
- Gift plan design.
- Administrative time to type, print and compile documents.

Plan Delivery

- Binder Delivery to review planning options / opportunities.
- Review with donors and professional advisors.
- Schedule follow-up visits to complete your personal plan.

To Schedule a visit email:
HCL@giftplanningservices.com
or call 715-838-0368.

It's next to impossible to do something if you don't know it exists...or how it applies to you.



Working in a collaborative relationship with



and your professional advisors.

Gift Planning Services, LLC, offers your family a guided educational process that shows what your estate would look like if you had to transfer it today, and what it could look like if you were to implement different charitable tools, wealth preservation tools and gifting techniques. Many of these concepts allow YOU to control the distributions to both family and charity.



www.giftplanningservices.com