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PERSONAL PLANNING *Newsletter*

Spring 2024

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Estate Planning...

...Planning for Peace of

Mind

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1350 Halyard Dr., West Sacramento, CA 95691

Plan Your Life Like Your *Vacation*

If You Have Planned a Vacation, You Can Plan Your Estate

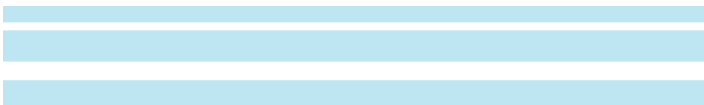
Almost two-thirds of all adults have no estate plan. One of the most common reasons is it feels too overwhelming or complicated to create a plan. It does not have to be. If you have ever planned a vacation, you can plan your legacy.

You might be surprised to learn that planning your estate might can be easier than planning your next vacation. It is also more rewarding. For a vacation, there are endless possibilities. When do we go? Where do we go? How will we get there? There are so many things to consider. However, for your plan, you already know who is important, and what values are significant to you. It's not a matter of what you want to do. It's just about deciding to get it done the right way.

Your legacy plan can be flexible and can be changed. We have tips and tools to help you. For example, you can leave more for family with some tips we have for saving taxes. You might even create income from options you never knew existed. Contact us for more information.



*Even not
having a
plan is
a choice*



*Did you know
you can use a
second home
to lower
your taxes?*



Life on the *Beach*

If you are among the fortunate few to have a second home, maybe one on the beach, did you know you can use it for tax advantages? With a life estate, you can continue using it the home for the rest of your life just as you always have. However, when you die, the property transfers to our organization.

Because of that future transfer, you receive a tax deduction today for the present value of the remainder interest. There are a few things we need to discuss, such as maintenance and insurance – they are all things you would expect and none of them diminish your enjoyment of the property. You can also create a life estate for your primary residence. Ask us how either or both can work harder for you.



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Your Family *First*

Every day holds peace of mind when you know you have taken care of yourself and your family. A charitable remainder trust (CRT) gives you that comfort, along with more benefits.

When you transfer cash, stock, or property into a CRT, the trust pays you and/or your family back at a payment rate (within limits) you choose. There are options allowing you to customize it to fit your needs and goals. After your family receives all its payments, any remainder goes to our organization. Because of that, you receive an income tax deduction when you begin it. There are other possible tax benefits to explore as well.

We can show you your options so you can customize the CRT to give you what you want. Give yourself the comfort that only comes when you have provided for your loved ones and the causes you cherish.



*Peace of mind is
the best plan you
could ever create*

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