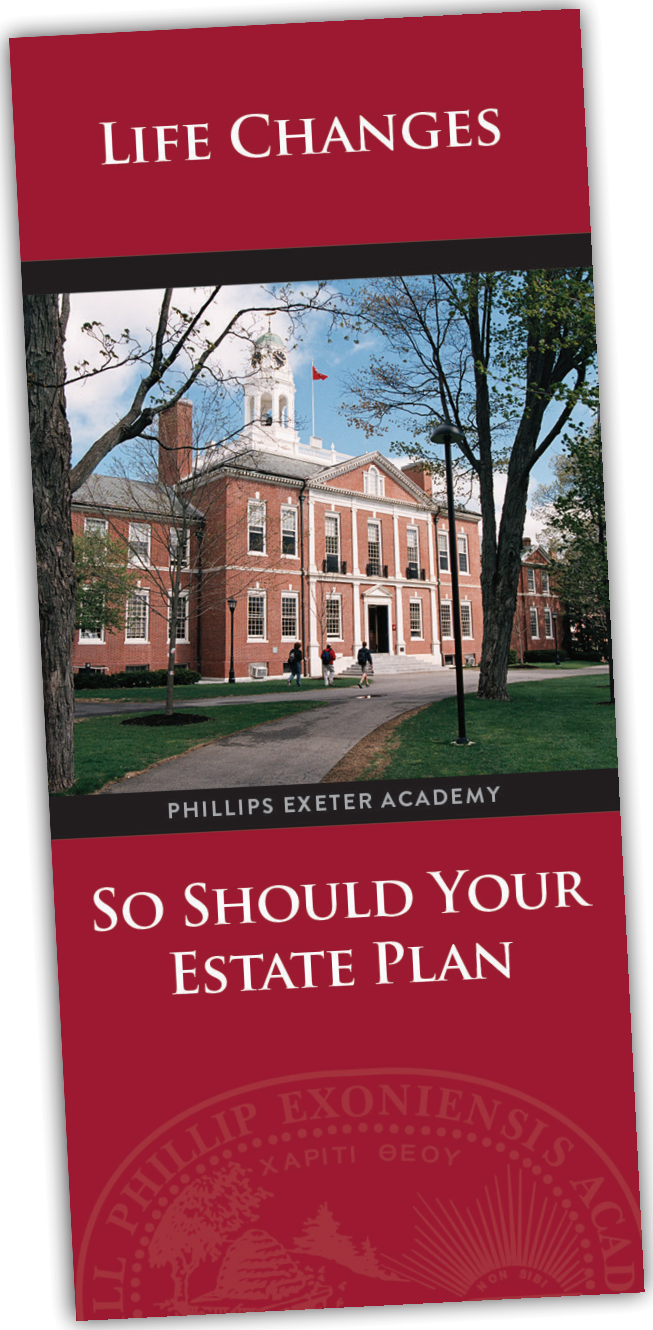
Educate Your Prospects on the importance of
Keeping an Estate Plan Up-to-Date



A must-have publication.

A timely message in an elegant, full-color brochure that reminds your prospects and donors to keep their estate plans up-to-date—and to include your organization in them.

This handy, yet valuable guide for your prospects tells them when they should review their estate plan: the changes in personal and family status; in work, retirement, and need for long-term care; in taxes on lifetime and at-death transfers that can often make an estate plan obsolete. Encourages readers to take inventory, and action — and to stay aware of how relevant and useful their plans will continue to be.

Urges prospects to include a gift to your organization as they make ongoing changes to their plans.

Includes a clear, understandable explanation of how codicils can simplify amendments to estate documents.

Excellent and elegant simple brochure for materials to be given to prospects and their advisors at your estate-planning seminar or reunions.

Summary:

- ✓ Introduction
- ✓ How and when will you transfer assets?
- ✓ Who will be a beneficiary?
- ✓ What are your assets, and what are your needs?
- ✓ Remember the codicil!
- ✓ Always a wise change: add a gift to [your organization.

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