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Family First

Does your plan match Your Priorities?

With recent changes to the tax code, now is the perfect time to review your plan to ensure it achieves your goals to provide for family and to support your favorite charities.

With tools such as the charitable remainder unitrust, charitable gift annuity and life insurance, we can help you direct your assets to your loved ones and avoid taxes while also giving to a charitable cause like ours.

Call or email us for a complimentary no-obligation look at the tools and strategies we have to help you reach your goals.

Pay More Taxes or Give More to Your Family – Which Do You Choose?

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

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The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

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With proper planning capital gains taxes can be reduced or eliminated.



Create a charitable legacy supporting the causes important to you while freeing assets for family.



The estate tax may be reduced or eliminated.