

PLANNING FOR YOUR LEGACY AND CHARITABLE GOALS CARRIES MANY CONSIDERATIONS



BASIC

Beneficiary Designations

Wills & Trusts

Power of Attorney

Annual Charitable Gifts

Charitable IRA Distributions

MODERATE

Revocable Trusts

Family, Marital, QTIP Trusts

Irrevocable Life Insurance Trusts

Donor-advised Funds

Special-Needs Trusts

ADVANCED

Grantor Trusts

Generation-Skipping/
Dynasty Trusts

Family Limited Partnerships

Family Foundations

Charitable Trusts



Kevin M Spahn, David J Lindberg, Kyle A DeRaedt, Timothy Michael Funke, Darren M Kriston and Nirav Patel use Spahn Financial as a marketing name for doing business as representatives of Northwestern Mutual. Spahn Financial is not a registered investment adviser, broker-dealer, insurance agency or federal savings bank. Northwestern Mutual is the marketing name for The Northwestern Mutual Life Insurance Company, Milwaukee, WI (NM) (life and disability insurance, annuities, and life insurance with long-term care benefits) and its subsidiaries. David J Lindberg, Kevin M Spahn, Kyle A DeRaedt, Timothy Michael Funke, Darren M Kriston and Nirav Patel provide investment advisory services as Advisors of Northwestern Mutual Wealth Management Company® (NMWMC), Milwaukee, WI, a subsidiary of NM and federal savings bank. David J Lindberg, Kevin M Spahn and Darren M Kriston are Agents of Northwestern Long Term Care Insurance Company, Milwaukee, WI, (long-term care insurance) a subsidiary of NM. David J Lindberg, Kevin M Spahn, Kyle A DeRaedt, Timothy Michael Funke, Darren M Kriston and Nirav Patel provide investment brokerage services as Registered Representatives of Northwestern Mutual Investment Services, LLC (NMIS), a subsidiary of NM, registered investment adviser, broker-dealer and member FINRA (finra.org) and SIPC (sipc.org). David J Lindberg, Kevin M Spahn, Kyle A DeRaedt, Timothy Michael Funke, Darren M Kriston and Nirav Patel are Insurance Agents of NM. The products and services referenced are offered and sold only by appropriately appointed and licensed entities and financial advisors and representatives. Financial advisors and representatives and their staff might not represent all entities shown or provide all the products or services discussed on this website. Not all products and services are available in all states. Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, CFP® (with plaque design) and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. The Chartered Advisor for Senior Living (CASL®) designation is conferred by The American College of Financial Services



NORTHWESTERN MUTUAL PRIVATE CLIENT GROUP