PLANNING FOR YOUR LEGACY AND CHARITABLE GOALS CARRIES MANY CONSIDERATIONS

BASIC	MODERATE	ADVANCED
Beneficiary Designations	Revocable Trusts	Grantor Trusts
Wills & Trusts	Family, Marital, QTIP Trusts	Generation-Skipping/ Dynasty Trusts
Power of Attorney	Irrevocable Life Insurance Trusts	Family Limited Partnerships
Annual Charitable Gifts	Donor-advised Funds	Family Foundations
Charitable IRA Distributions	Special-Needs Trusts	Charitable Trusts

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