PROVIDE FOR LOVED ONES AND GETTYSBURG COLLEGE

You control your assets during your lifetime and provide gifts after life
- Inheritances for loved ones
- Support for Gettysburg College
- How? Via your will, a living trust, or a beneficiary designation

Questions to consider regarding loved ones for your estate plan
- Do you wish to leave the same amount for each person?
- How much for beneficiaries’ needs and/or for societal impact?
- How much is enough? Specific amount, percentage or particular asset of your estate?
- Outright gifts or planned installment inheritances?
- When should the inheritance start? How long should it last?

Questions for gifts to Gettysburg
- How can you provide a legacy that speaks to and honors your values?
- What program(s) do you want to support?

Beyond wills, living trusts, and beneficiary designations
- There are other plans that might better address your goals and concerns
- Some offer significant flexibility; ask Gettysburg for details

Planning Considerations
- Should you provide fixed or variable income for individuals?
- Which of your assets offer the greatest planning benefits?
- Do you wish to begin funding during your lifetime?
- What are your current needs and future concerns?

Planning Benefits
- Identify a creative approach to solve your planning challenges
- Maximize use of assets and impact both loved ones and Gettysburg
- Minimize the cost and time of probate
- Leverage Gettysburg’s planning expertise
- Benefit from professional, low cost asset management and administration

Providing for Loved Ones and Gettysburg does not have to be an “either or” equation.
Our staff can help you explore the issues & planning options.

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