

Estate Planning vs. Planned Giving

Estate Planning is more than a simple will. It is a **PROCESS** to consider alternatives for, to think through, and to set up legally effective arrangements that will meet your specific wishes when something happens to you or someone you care about.

Its Value. Estate Planning:

- minimizes potential taxes
- establishes contingent plans regarding health care
- coordinates the disposition of investment accounts, business interests, life insurance, and retirement accounts

What does it look like? When planning for your estate, your plans may include these documents:

- Wills
- Living Will/Health Care Directive
- Durable Power of Attorney for Property
- Trusts- revocable or irrevocable
- Limited Family Partnerships

Transferring your wealth tax efficiently can make a huge difference in helping you pass on more of your assets to your heirs and favorite causes. A number of philanthropic strategies are available that allow you to direct your wealth in ways that reflect your values and beliefs, meet personal financial goals and objectives, and provide important tax benefits.

This is the process of **PLANNED GIVING**. It is a process that involves a significant amount of thinking and planning. It is a process of identifying your assets and matching them up with your values.

That is why the HCS Foundation has partnered with the Barnabas Foundation. We pay membership fees so that YOU can access their services **free of charge**. Through this partnership, you can access lawyers and financial planners who have biblical stewardship in mind. They will guide you through the **CONFIDENTIAL** process of estate planning. They have nothing to sell; therefore the process is **all about your needs and goals**.

When you meet with our Friends at the Barnabas Foundation, you will:

1. Take a look at the PEOPLE you are planning for
2. Take a look at the PROPERTY you are planning with
3. Formulate the PLAN to meet your needs and goals
4. Identify the PARTICIPANTS who will help administer the estate plan.

For more information, contact Jodi Lineburg, Development Director, Highland Christian School, 219-838-0356 x 165 or by email at jlineburg@highlandchristian.org.