
A
GIFT
FOR
You
SAMPLE

You have been carefully considered and recognized as a person whose life and reach have made a very positive impact on others. Because of that, Nonprofit Name Here wishes to reciprocate with a gift that will direct some goodwill back to you.

Our gift is a confidential, values-based estate planning service.

Through the Thompson & Associates planning service, you will have an expert and objective third party specializing in crafting a personal estate plan that paints far more than your financial picture.

Values-based planning ensures your story is communicated with the same passion, values, and love that have defined and inspired you over your lifetime.

An estate plan designed through Thompson & Associates does just that. It stands out and lives on as an extension of you.

This service is complimentary, with no hidden agendas, no pressures, no obligations, and no time restraints. All conversations will be held in the strictest confidence without the presence of any foundation staff member.

We hope this journey is rewarding and reflective of all your personal and financial desires.

Your friends at,

Nonprofit Logo Here

THOMPSON & ASSOCIATES:

Eddie Thompson, Founder & CEO, Thompson & Associates

Many people do not know they have options when it comes to the way their intentions are expressed in their estate plan. Thompson & Associates wants you to know what possibilities are available to you.

As the nation's premiere values-based estate planning firm, we believe the caliber of experience Thompson & Associates brings to this very personal process will significantly impact your life and the generations that follow.

Eddie Thompson, founder and CEO, brings more than 30 years of experience to the visionary premise that there is a significant disconnect in the way traditional estate planning serves clients and the results it yields. Traditionally, an individual's assets drive the planning process, with little emphasis on the core values and experiences that have molded a person's life.

With traditional planning, individuals often struggle to answer two very important questions, which leaves them paralyzed in making the most substantial financial transfer of wealth in their lifetime.

If you do not know 1) how much you will need to ensure financial security for your future, or 2) how to transfer assets to loved ones in a fair, reasonable, and responsible way, these uncertainties can result with no plan, or a plan that does not truly reflect all of your goals and intentions.

Eddie created a values-based process that first focuses on your values and beliefs, and later incorporates your assets. The resulting plan uniquely empowers you to express your goals and intentions by combining your values with your valuables.

An additional benefit of this unique planning process is that it can allow you to self-direct the portion of your estate that must be used for the greater good of society, otherwise known as tax. By incorporating highly specialized planning tools, the process gives you control over your lifetime accumulations while positively impacting generations to come.

TELLING THE BIGGER STORY

THE THOMPSON & ASSOCIATES EXPERIENCE

The Thompson & Associates process thoughtfully combines your financial journey with your values story. This eye-opening process will help you create or revise an estate plan that communicates your values, captures your priorities, outlines your intentions, and protects your assets.

At the end of this journey, you will hold the blueprints to a plan that will be a gift to yourself and the people you love.

A VALUES-BASED ESTATE PLAN WILL ADDRESS YOUR BIGGEST CONCERNS:

- **Do I have enough money to ensure financial security for my future?**
- **How can I provide for my spouse, children, and grandchildren?**
- **How can I give to my heirs in responsible and relevant ways?**
- **How can I self-direct the portion of my estate that must be used for the greater good of society, commonly collected as tax?**

"Your estate plan is the single greatest financial impact you can have on your family and the largest financial transfer you will ever control. Planning for this transfer can be profoundly liberating and positive when it breathes life and possibility into the future."

~ Eddie Thompson, Founder & CEO, Thompson & Associates

HOW IS THE THOMPSON & ASSOCIATES PROCESS DIFFERENT

THAN WHAT MY ATTORNEY OR TRADITIONAL ESTATE PLANNER WOULD DO?

The Thompson & Associates process enhances, enriches, and builds upon the work of your legal and tax professionals. Thompson & Associates works as part of your team to complement the services other advisors provide to you.

Specializing in asset protection and distribution, attorneys seldom have the opportunity to participate in deeper conversations regarding family values and dynamics. Time constraints, billable hours, and challenges posed by potential litigation often restrict the breadth and depth of conversations between attorneys (or other professional advisors) and their clients.

Because of Thompson & Associates' independent nature and specialized training in values-based planning, the process allows you to move at your own pace and take the time to explore options.

With Thompson & Associates, the often dreaded process of estate planning becomes life giving. Combining your values with your valuables, you will create a plan that tells the distinct story of your successes, lessons learned, love of family, and the hopes and plans you envision for a more significant future.

"I thoroughly enjoyed working with Thompson & Associates. I needed (and appreciated) the nudge this process gave me to review my estate plan. My associate took the time to talk to me about my values and how I wish to be remembered, and thoughtfully presented options to accomplish my goals. I wholeheartedly recommend Thompson & Associates…this was a good process and a good use of my time."

~ John Zuerrer

HOW DOES THE PROCESS WORK?

STEP 1

Associate First & Last Name Here, our Thompson & Associates representative, will meet with you to discover and highlight the people, values, passions, and dreams that matter most to you and have had the greatest impact.

STEP 2

Thompson & Associates will review the results of your questionnaire to ensure they fully understand what is important to you and what values and goals you want your plan to reflect.

STEP 3

Next, Thompson & Associates will review any current estate documents you have, discuss fiduciaries, and incorporate your net worth statement.

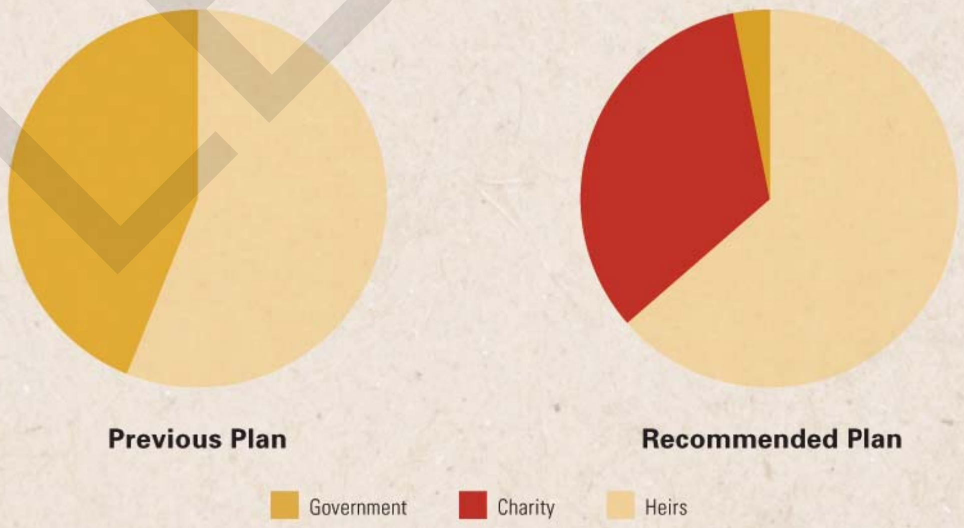
STEP 4

Thompson & Associates will reflect your story in a plan, creating recommendations for a comprehensive, strategic estate plan based on your values and objectives.

STEP 5

You will then take the necessary steps to put your new, values-based estate plan into effect. Utilizing the recommendations of Thompson & Associates, you will meet with your own advisors to implement an estate plan that supports and reflects your values story.

PREVIOUS PLAN TO RECOMMENDED ESTATE PLAN



Sample illustration

THOMPSON & ASSOCIATES' TECHNICAL EXPERTISE

Thompson & Associates developed their comprehensive planning process over several decades. The process helps you create a thoughtful estate plan that transfers assets to the people you love and the causes you support. This often uncovers ways in which you can secure your future, provide for loved ones, and self-direct all or part of your estate that otherwise would have been collected as tax.

Q&A

Why do I need to create or review my estate plan?
Life and tax law are in constant, ever-changing motion. Creating or reviewing your estate plan is important to ensure that your documents appropriately reflect your values. A comprehensive estate plan incorporates your values in the distribution of your valuables, considering current tax laws.

I recently drafted a new estate plan with a top-rated attorney. What value is there for me in this process?
This process will increase your understanding of your existing plan, provide a second set of eyes to ensure it accomplishes what you envisioned, and possibly educate you on some important giving and tax options that might be of interest to you. Thompson & Associates' expertise in this area could add a values-based component that provides significant meaning and impact to your current plan. We know this process will be worth the time you invest.

What is the cost to me for this service?
Nonprofit Name Here provides this service at no cost to you.

Does Thompson & Associates execute the plan?
No. You share the recommendations you receive with your own attorney to take the steps necessary to put your new or updated values-based estate plan into effect. Complimentary assistance is provided by any of their full-time attorneys if your network of professionals has any questions.

What is the result of the process?
In general, this process provides clarity, peace of mind, and an incredible sense of significance.

Specifically, you will complete this process with a comprehensive estate plan recommendation that tells your story, reflects your values, and fulfills your financial desires.

Thompson & Associates will also encourage you to compose a letter to your loved ones, which many people find to be an invaluable part of the process.

Is my information kept private?
Absolutely! This service is completely confidential. Thompson & Associates serves as your personal, trusted planning coach. Your information will not be shared with anyone outside of Thompson & Associates without your approval, including Nonprofit Name Here.

I'm not ready to make final estate decisions, should I still participate?
Definitely! You have everything to gain from taking this opportunity to create or update your estate plan to reflect your values and current situation.

THOMPSON & ASSOCIATES WILL NOT:

Solicit funds directly or indirectly from you.

Sell or offer to sell any services or products to you.

Manage money or provide legal or accounting services. You have no obligation to follow the recommendations Thompson & Associates offers.

Share any personal information gathered from you through the planning process without your prior written consent.

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Thompson & Associates

Values-Based Estate Planning

www.ceplan.com