



Your Estate & Gift Planning Organizer™

Helping You To Develop & Maintain a
Sound Estate & Gift Plan
for You & Your Family

The only way to control the distribution and management of your property in the event you or a loved one becomes incapacitated, or at your death, is through a properly crafted estate & gift plan. The handling of your financial affairs can turn into a very costly and emotionally frustrating ordeal for you, your family, and heirs.

Proper estate & gift planning develops a strategy, based upon your objectives, to manage your finances during your lifetime if you become incapacitated, and how to transfer your property and care for your survivors upon your death. ***Your Estate & Gift Planning Organizer*** helps you develop this strategy.



Your Estate & Gift Planning Organizer™

- ✓ Saves time & money
- ✓ Provides you peace of mind
- ✓ Helps you make the right decisions
- ✓ Complements your financial advisors
- ✓ Supports you over your lifetime

Your Estate & Gift Planning Organizer

is not just information. It's a

Systematic Approach

to managing your Estate Planning
over your entire lifetime





Your financial PARTNER™ Series

Your Estate & Gift Planning Organizer™

Helping To Develop & Maintain a Sound Estate Plan
for You & Your Family

Organizing financial information is challenging for most of us. Your Estate & Gift Planning Organizer streamlines the estate planning process. It assists you in preparing your estate plan in a quick and easy manner that saves you time and money.

Your Estate & Gift Planning Organizer simplifies and clarifies the estate planning process. It provides an overview of the estate & gift planning rules and jargon, and outlines a special six-step system for organizing, analyzing, planning and efficiently developing your family estate. You can go as deeply into each of the steps as you like, or you can quickly get an overview of what need to be done and manage your situation as is appropriate for yourself and your family.

You can use this system to be better prepared to work with your estate planning attorney and financial advisors at a higher level and save hours of your and your advisor's time (money).

Once your estate & gift plan has been created or updated, this amazing tool helps keep your estate plan organized and up-to-date over your lifetime.

- **Page Count – Including Covers 118**
- **Unique Forms – 22 within**

To learn more about or order

Your Estate & Gift Planning Organizer™

for yourself, family, and friends go to

www.TheFinancialAwarenessFoundation.org



*All the tools you need to
organize, plan,
& manage
your and
your family's
estate & gift plan*

What others say...

"It helps the reader to organize their financial information and thinking so they can make informed decisions while educating them on various estate planning strategies. It also includes a comprehensive useful form set and a demystifying 6 step process designed to save time and money working while with estate planning financial professionals."

**-Sidney Kess, Esq., CPA,
J.D., LL.M., AEP® Distinguished**

"Your Estate & Gift Planning Organizer streamlines the estate planning process, helping the user prepare their estate plan in a quicker and easier manner thus saving time and money."

**-Robert Eyles, Chair
Department of Economics
Sonoma State University**



The **FINANCIAL AWARENESS** Foundation

"Your Financial Partner"

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"Improving financial awareness & financial literacy"[™]
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