

# ROAD TRIP

PLAN FOR YOUR  
LIFE'S JOURNEY



We have tools and ideas  
to save you money  
while providing for  
the people and causes  
important to you.

## TIME FOR A ROAD TRIP

Knowing that life is one long road trip, we can help you plan your life's journey so you can experience joy and peace of mind. Ask us about the following destinations and what they offer you:

**CHARITABLE GIFT ANNUITY** — Gives you (or you and your spouse) lifelong payments at favorable fixed rates, while possibly lowering your income and capital gains taxes.

**PAYABLE ON DEATH FORMS** — Without the formality of a will or trust, you can give significant assets to your family and favorite charitable causes by completing a simple form.

**WILL** — Not having a will is like leaving on a trip with no destination in mind. Write or update yours and live every day knowing your values will be honored and your legacy remembered.



No matter where you  
are, we can help your  
life's journey.

CALL OR EMAIL US TO  
LEARN ALL WE CAN DO  
FOR YOU.

No matter how far into your life's journey or planning you are, it is never too late to consider the destinations above. You decide your trip based on your values and priorities. We can help you get there.

**A WILL**  
is more about  
values than  
valuables.