

American Baptist FOUNDATION

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THE Keys TO Success

Power in Your Pen

If you have a pen, you have power. If you are like most people, most of your liquid assets are in commonly held accounts. You used your pen to open them, now that same pen can give more power to your accounts such as:

- ◆ Checking account
- ◆ Savings account
- ◆ Investment account
- ◆ Retirement account

Give these new life with a beneficiary designation. Also known as a payable on death form, a beneficiary designation is what you can use to ensure these assets go where you want when you no longer need them.

Nothing Is Simpler

Your bank, wealth manager or administrator can give you this form. It is usually easily accessible online. It only takes a few moments to complete. When you do, you designate who you want the funds to go to when you die.

- ◆ You can leave all your account to one person or divide it among family
- ◆ You can also choose to leave some or all to American Baptist ministries and missions



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AVOID TAXING SITUATIONS.

USE THAT GROWTH FOR A

GREATER GOOD.

ASK US HOW A BENEFICIARY DESIGNATION CAN HELP YOU. WE HAVE TOOLS AND TIPS TO HELP YOU LEAVE YOUR ACCOUNTS THE WAY YOU WANT TO LEAVE THEM. MOST IMPORTANTLY, IF YOU DO INCLUDE OUR ORGANIZATION IN YOUR PLANS, WE CAN GIVE YOU THE PROPER IDENTIFYING INFORMATION TO ENSURE YOUR GIFT GOES WHERE YOU WISH.

CONTACT US TO GET STARTED. YOU'RE ONLY MINUTES AWAY FROM A SMALL FORM THAT CAN MAKE A BIG DIFFERENCE.