



# Legacy Planning Workshop



## CREATE YOUR LEGACY!

Join us for this FREE, hour-long workshop. Our panel of experts will answer your questions about:

- estate planning
- creating and updating a will
- charitable gifts and more!

Learn how you and your family can build a meaningful legacy in support of causes you care about, including local Catholic organizations. Light refreshments will be served.

**Tuesday, September 14, 2021**

**Choose Your Time:** 10:00 a.m. OR 6:00 p.m.  
Doors open 30 minutes prior to each session.

New Hampton Community Center  
112 East Spring St.  
New Hampton, IA 50659

*Virtual options also available.*

**Registration deadline:**

Friday, September 3, 2021

**RSVP:** 641-394-1626 OR

[www.OurCFAD.org/NHLegacy](http://www.OurCFAD.org/NHLegacy)

The goal of this informational workshop is to help you better understand the process of estate & legacy planning.

*Hosted by:*



THE CATHOLIC FOUNDATION  
IN THE ARCHDIOCESE OF DUBUQUE



The mark you make shows the legacy you continue to create. Make sure your will or estate plan reflects you. No matter your income, financial status or age, a will is essential to avoid delays and confusion among future survivors and to be sure your assets go where you intend.

### Planning now:

#### *Provides peace of mind for you & your family*

- Could provide regular income or a one-time amount for family, possibly passing on larger amounts in some situations
- Designates guardians for dependents
- Indicates care wishes and who acts on your behalf

#### *Ensures hard-earned money goes where you want*

- Reduces probate costs
- Decreases estate, income and capital gains taxes
- Potentially increases current income and tax deductions

#### *Helps you consider to include your favorite charities along with your family*