

# How to Leave a Legacy

Tools to create a lasting legacy!™



From the list below, determine the legacy you wish to leave the next generation. Be sensitive; think about how the recipient may feel about your legacy.

- Leave them nothing.
- Leave them everything, AND provide insurance proceeds to fund the income and possibly estate tax liability they will incur from inheriting the estate including IRA's and tax-deferred annuities.
- Leave them whatever is left over from the gross estate minus expenses.
  - Leave a “lump sum”
  - Leave a “stream of income”
  - Leave a “combination of these”
  - Leave a “trust with control given at certain ages”
- Leave them a family educational fund.
- Leave them a generational “generosity” fund—a family foundation to last forever.

