

A GIFT FOR YOU

You are someone who cares deeply about the future of your community and makes a positive impact on the lives of your neighbors. That's why we want to give you the gift of confidential values-based estate planning with Johni Hays of Thompson & Associates.



Johni Hays, J.D., is a recognized expert on charitable gift planning with 30 years of experience.

*She is executive vice president of Thompson & Associates, author of the book *Essentials of Annuities* and co-author of the book *The Tools and Techniques of Charitable Planning*. She also has been quoted in *The Wall Street Journal*.*

WHAT IS IT?

This service is complimentary to you, with no hidden agendas, no pressures, no obligations, and no time restraints. Johni will work in conjunction with your existing plans or to help you start from the beginning.

While your conversations will be kept confidential from Foundation staff, you are encouraged to include your family members or professional advisors in on the process at any time.

HOW CAN JOHNI HELP YOU?

Johni will host an introductory discovery meeting to help you identify and reflect on your personal values, passions, and goals.

Together, you and Johni will review any of your current estate planning documents and outline your full financial picture.

Johni will offer recommendations for a comprehensive and strategic estate plan that fully reflects your identified values and goals. In addition, she can often suggest important tax-savings strategies and offer creative solutions to ensure your plans have the biggest impact.

Once finalized, Johni will help you share your new values-based plan with your attorneys or other professional advisors to finalize documents and help implement the recommendations.

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We knew it was a good idea to update our estate plans and enjoyed working with Johni. We appreciated her professionalism and dedication to confidentiality. Working with her increased our knowledge on current tax laws and estate tax strategies, and we felt comfortable as she guided us through the process. We highly encourage others to take advantages of this opportunity.

–Tim and Christine Conlon


Community
Foundation
OF GREATER DUBUQUE

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