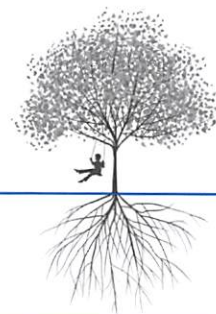


# Legacy Builder

An Estate and Charitable Planning Guide



LIVE UNITED

United Way



United Way of Brevard

## Considering a Legacy Gift?

Estate Planning Attorney Answers Questions About Planned Giving



*Attorney Ganon Studenberg works closely with Tambre Clark, director of investor relations, to help clients structure planned gifts to United Way.*

Local attorney Ganon J. Studenberg focuses his practice on estate planning and matters involving the administration of trusts and estates. He has worked with United Way of Brevard County for more than seven years.

Tambre Clark, director of investor relations for United Way of Brevard County, recently sat down with Ganon to discuss how someone considering a legacy gift might get started. Read on to see Ganon's responses to her questions.

**Q. If someone is interested in leaving a legacy as part of their will, what steps do they need to take?**

**A.** They should contact their estate planning attorney or seek an attorney experienced in estate and charitable planning to discuss available options.

**Q. Why is it important to make these decisions?**

**A.** If you die without an estate plan, your assets which are subject to probate will be distributed according to the laws of your state and not according to your wishes. This would not include charitable organizations that you have been supporting during your lifetime.

Estate planning is for everyone and will help plan for disability, death; and accomplish your estate planning, tax, family and philanthropic goals.

**Q. Are there simple ways to leave a legacy?**

**A.** A simple way to create a legacy is by naming a charitable organization as a beneficiary under your will, trust, retirement account or life insurance.



### TALK TO US

United Way's planned giving program staff is committed to helping our most dedicated contributors discover special ways to continue playing an active role in supporting our mission while preserving or enhancing their overall financial security. Please contact Tambre Clark at (321) 631-2740 or [tclark@uwbrevard.org](mailto:tclark@uwbrevard.org) with any questions you may have about creating a legacy at United Way.

Thank you again for your impact on our community, now and in the future!