



## **Hosting A Legacy Planning Seminar**

Our seminars focus on elements of estate planning, financial planning and Catholic legacy planning for individuals and families of any age. Attendees will be provided information on the following practical topics:

- key estate planning documents everyone should have,
- living trusts versus wills,
- how to use FreeWill to create an estate plan,
- avoiding probate,
- nominating a guardian for minor children,
- Catholic advance healthcare directives, powers of attorney,
- asset transfers,
- how to avoid an accidental disinheritance, and
- passing along your values and leaving your family the gift of peace, security, and a lasting legacy.

### ***Discussion Topics***

#### **1. Seminar Options:**

*\* Each session includes a 15-minute unique presentation or activity on legacy planning, telling your family story or including Catholic parishes, schools, and ministries in estate plans.*

##### **A) Three-Part Series**

We would offer 3 one-hour sessions held on three separate days, typically one week apart.

*Session 1 : Wills & Estate Planning- includes Catholic Medical directives (approx. 60 minutes)*

Sample Topics

- Wills & Estate Planning in Uncertain Times: Do you know the 3 documents every Catholic American needs to have
- The Biggest Misconceptions about Estate Planning

*Session 2: Financial Planning (pre-retirement, post-retirement) (approx. 60 minutes)*

Sample Topics

- Taxes & Estates: Protecting Your Family & Planning Today for a Better Tomorrow
- 5 Must-do Financial Planning Strategies (and 5 Mistakes to Avoid)

*Session 3: Catholic Funeral Rites & Funeral Planning (approx. 40 mins)*

Topic and speakers arranged with David Branson

**B) Two-Part Series**

We would offer 2 one-hour sessions, either on two separate days or all in one day.

Session 1: Wills & Estate Planning

Session 2: Financial Planning

**2. Seminar Dates and Times**

Plan on 20-50 guests (majority will be retired).

Popular dates and times include:

- a. Tuesday, Wednesday or Thursday
- b. After daily Mass, 1:00pm or 6:00pm

**3. Logistics**

- Seminars last 90 minutes
  - 20-minute Pre-session registration/refreshments
  - 60-minute Presentations
  - 10-minute Post-session 1:1 Q&A
- Parish handles RSVP list
- Requires parish set up, clean up and personnel on-site (Tables, chairs, audio/visual, refreshments, etc.)
- Attendee information and resources will be provided in a folder (there is a fee associated with some of the printed resources)

*If held virtually:*

- *Seminars last 60 minutes*
- *The Catholic Foundation and parish office collaborate on RSVP list*
- *Sessions are recorded and available to all who registered (regardless of their attendance)*
- *Resources will be provided digitally (unless mailed copy is requested)*

Attendees will receive the following resources:

- Free One-Hour Consultation (Estate Attorney, Financial Planner and/or Philanthropic Advisor – virtual or in person)
- 28-Page Wills and Estate Planning Guide\*
- Catholic Legacy Letter or Journal\*
- Catholic Declaration on Life and Death (Living Will/Health Surrogate) & Guide to Understanding the Catholic Declaration on Life and Death
- Guides to Creating a Family Mission Statement and a Catholic Legacy Video
- Opportunities to Leave Your Legacy of Faith
- Faithful Steward Organizer
- Legacy Gift Notification Form

\*These materials are available at a minimal cost.