

Is your parish, Catholic School or Catholic Agency remembered in wills, trusts or other estate planning vehicles on a regular basis? *No*

Can your parish, Catholic School or Catholic Agency invite Catholics to remember you in their estate plan? *Yes*



Through a Charitable Estate Planning Seminar!

The Diocesan Office of Development & Stewardship can conduct a Charitable Estate Planning Seminar for you ...

WHO: Mr. Michael Andersen, CPA
Atty. Leo Puhalla
Mr. Jeff Rossi, JDL, CLU
Mr. Pat Palombo, CFRE

WHAT: Topics covered include:

- The importance of an effective Estate Plan
- Avoiding taxes and settlement costs
- Pitfalls of Joint Tenancy
- Unlocking the mysteries of Trusts
- The Popularity of Charitable Gift Annuities
- Advantages of Charitable Giving
- Creative uses of Life Insurance
and more

WHERE: Your location

WHEN: **Call now** to schedule a seminar this fall

This ninety-minute Power Point Slide Show seminar is similar to those offered in your area by Commercial Financial Planners with one exception ...

no sales pitch and nothing is sold! It is an “information only” seminar and it’s FREE!

PICK UP THE PHONE!

Call Pat Palombo at (330) 744-8451 ext. 325 or email patpal@cboss.com and schedule a seminar NOW!

