

LegacyChange Plans

Simplified Estate Asset Plans with Tax Savings

Stealth Tax Awareness (Tax Bracketing)

*Economical-Efficient Flexible Asset Transfer Insured Through
a Non-Profit Asset Transfer Organization*

Immediate Tax Reduction Saves Taxes, Time and Expense

Guaranteed & Insured Income from Proceeds & Contributions

Manages Inheritance for Heirs & Beneficiaries as You Wish

Prevent Inheritance Disagreements and Minimize Family Conflicts

Avoid Probate Expense & Time while Maintaining Confidentiality

Ideal Retirement Simplified Managed Process

Experienced & Proven Planning Provides Legacy

Economical and flexible life and after estate plans. Can replace assets economically and simplified in lieu of maintaining assets in an expensive and time-consuming trust or will. Each individual's personal LegacyChange Plan can involve a simple transfer of assets such as Securities, Annuities, Real Estate or Cash to a 501(c)3 non-profit foundation in exchange immediate tax reduction or immediate or deferred, taxed favored guaranteed income for life or set number of years. Because there is a 501(c)3 non-profit foundation there is an immediate income tax deduction, capital gains tax reduction, depreciation recapture tax reduction plus estate tax reduction and tax bracket reduction are potentially relieved for owners and beneficiaries.

www.LegacyChange.com

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We do not market annuities or insurance, list real estate or businesses. We may, with client request or permission, refer to those who do.

FEC-KW20200304