**TO USE THIS TEMPLATE:**

**COPY EVERYTHING AND PASTE INTO A NEW MAIL MESSAGE IN OUTLOOK.**

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**Do You Need An** **Advanced Estate Plan?**

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| ***An advanced estate plan can help ensure not only that your family's future financial needs will be taken care of, but also that your wealth will be passed on in the most tax-efficient manner possible. It's also an opportunity to create a legacy for grandchildren and to make charitable gifts in a way that best suits your financial situation.*****In this seminar on Advanced Estate Planning Basics, you'll learn:*** Who can benefit from advanced estate planning strategies
* The changing landscape of the federal estate tax system, including information on exclusions and the marital and charitable deductions
* Techniques to minimize estate taxes, including different trust arrangements
* Common estate freeze strategies such as family limited partnerships and private annuities

You'll also receive a free workbook created just for this presentation. The workbook contains key information, worksheets, and questions to help you remember important points from the seminar.R.S.V.P.**To reserve your spot, please contact me at:**When & Where**DATETIMELOCATION****IMPORTANT DISCLOSURES**Broadridge Investor Communication Solutions, Inc. does not provide investment, tax, or legal advice. The information presented here is not specific to any individual's personal circumstances.To the extent that this material concerns tax matters, it is not intended or written to be used, and cannot be used, by a taxpayer for the purpose of avoiding penalties that may be imposed by law. Each taxpayer should seek independent advice from a tax professional based on his or her individual circumstances.These materials are provided for general information and educational purposes based upon publicly available information from sources believed to be reliable—we cannot assure the accuracy or completeness of these materials. The information in these materials may change at any time and without notice.Securities and investment advice offered through Investment Planners, Inc. (Member FINRA/SIPC) and IPI Wealth Management, Inc., 226 W. Eldorado Street, Decatur, IL 62522. 217-425-6340 This communication is strictly intended for individuals residing in the state(s) of IL. No offers may be made or accepted from any resident outside the specific states referenced.  |

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