**TO USE THIS TEMPLATE:**

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

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|  **Have You Created an****Estate Plan for Your Family?** |

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| **An estate plan is a map of how you want your personal and financial affairs to be handled in the future. An effective estate plan can help ensure that your family's financial needs will be taken care of, and that your personal wishes will be carried out in the manner you intended. It's a critical part of your overall financial plan.** |

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| **In this seminar on Estate Planning Basics, you'll learn:*** Why you need an estate plan
* Strategies to plan for incapacity, including special health care directives
* Wills, trusts, and life insurance
* Key tax basics, including an overview of the federal gift tax, estate tax, and generation-skipping transfer tax

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**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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