

DO YOU HAVE GOOD ANSWERS TO THESE QUESTIONS?

...about Taxes

- 1. Do you have a wealth distribution plan that will owe \$0 estate taxes?**
- 2. If you could choose between giving money to the federal government in taxes or giving that same money to worthy Kingdom causes, which would you prefer – does your current plan do that?**
- 3. Did you know that capital gains taxes are optional and do not need to be paid – are you paying any capital gains taxes needlessly?**

...about Giving

- 1. Did you know you can use your charitable giving deductions to pass assets on to your heirs gift and estate tax free?**
- 2. Did you know that your charitable giving can exceed 50% of your Adjusted Gross Income and it still all be “tax deductible?”**
- 3. Has your current plan been designed to maximize your current and future Kingdom giving while maintaining your desired lifestyle and your heir’s inheritance?**

...about Family

- 1. Are you and your spouse on the same page with all your planning goals and objectives?**
- 2. Are you sure that how and when you leave your heirs their inheritance it will end up blessing them and not cursing them?**
- 3. Have you openly communicated with your heirs what your wealth transfer plans are?**

...about Advisors

- 1. Are your advisors giving you godly counsel in their respective areas of expertise that is based upon a biblical worldview as opposed to a secular worldview?**
- 2. Do all of your advisors work together as a planning team – does everyone know what all the others are doing?**
- 3. How long has it been since you have carefully reviewed your plans with your entire advisory team and with your family?**

