CENTRA
Foundation

VALUES-BASED ESTATE PLANNING

Confidential and complimentary estate planning education provided by the Centra Foundation

Create a plan.
Get a second opinion.
Update an existing plan.

Why create or review an estate plan?

- Everyone needs a plan. Yours may be simple or more complex. You'll want to be sure your plan takes care of yourself and your loved ones without creating unnecessary tax consequences.
- Tax laws change. So do personal circumstances.
- Having a plan in place makes it easier for your loved ones to handle your affairs during a time of grief.
- Even if you believe you don't have a sizeable estate, do you want someone else to decide how to distribute your possessions?

Why is the Centra Foundation offering values-based estate planning?

- Thoughtful estate planning is life-affirming.
- Planning enables you to communicate your values upon death with the same beliefs that defined and inspired your life.
- Financial well-being is an important aspect of your health. Just as Centra relies upon highly skilled Caregivers to improve health, the Foundation aspires to improve financial well-being by providing expert education on a topic that many find complicated or uncomfortable.
- This service promotes estate giving and can benefit nonprofits throughout the community. As a charitably inclined individual, you can designate gifts to charities in your estate plan to make an impact.
- Distributing your possessions when you die is the largest financial transaction you will ever control. We believe our supporters deserve education on this topic.
- Generosity is a powerful healing force. Philanthropy heals both the recipient and the giver.

What others are saying about this process:

"Extremely helpful process. No pressure involved. No skin in the game from the consultant's standpoint."

"First, it pushed us to start the process and make decisions. The second benefit was the clarity of the presentation and how final recommendations were laid out for further action."

"No bias. Open discussion and no pressure."

How does the planning process work?

- The Foundation will schedule a personal meeting with you and Jeremy Pharr, JD, an expert in values-based estate planning. All meetings are complimentary.
- Jeremy will meet with you to discover your values and the people and causes that matter the most to you. He will review any estate documentation you may already have. He will recommend a comprehensive plan based on your values and objectives.
- All conversations will be held in the strictest confidence without the presence of any Foundation staff.
- The process can be completed in as few as one or two sessions, or as many as six or more. Jeremy will spend the time needed to ensure you completely understand your plan.
- Jeremy will refer you to your own advisors to execute your plan. He will not attempt to sell any services to you or solicit a gift.

How does the Foundation's estate planning process complement the services of tax and legal professionals and financial advisors?

- The process does not replace the work of accountants, attorneys or financial advisors.
- The process enriches the work of these professionals by providing an opportunity for a deeper conversation regarding values and how you wish to be remembered.
- The process allows you to move at your own pace and take time to explore options.
- The process ensures you are comfortable and confident in discussing your wishes with your own advisors.
- Without time or cost constraints, this process breaks down barriers to creating an estate plan.

Who is the expert?

Jeremy Pharr excels in relating complex legal and tax issues in a way that is clear so you can make informed decisions about your estate and legacy planning goals. Jeremy earned his JD from Vanderbilt Law School and his Fellow certification (FCEP) from the Charitable Estate Planning Institute. He is a member of the Association for Healthcare Philanthropy (AHP) and is an executive vice president with Thompson and Associates, one of the nation's leading firms in value-based estate planning.

What others are saying about Jeremy:

"He confirmed that we had done most of what he would have suggested. We called our lawyer and straightened out our 401K. Jeremy was easy to talk to and was very understanding of complicated family affairs."

"Great explanations of options for estate planning. Helps to set goals and priorities. He has obvious command of the material and is a great teacher."

Questions?

Please contact Allison Kughn Ebert at allison.ebert@centrahealth.com or 434.200.2376 or visit Legacy.CentraHealth.com to learn more.