

# THE FOUNDATION

Serving the Catholic Community of Eastern North Carolina

## **VIRTUAL CATHOLIC ESTATE PLANNING WEBINAR**

**Tuesday October 19, 2021**

### **TOPICS INCLUDE:**

- ◇ What to consider when planning the preservation and distribution of your assets.
- ◇ Which method suits your needs— for example Life Income Gift, Charitable Trust, Donor Advised Fund or a Bequest.
- ◇ The benefit of working with your local Catholic Foundation and hosted by trusted Professionals.
- ◇ What are the essential Estate Planning documents.
- ◇ Proposed changes in 2022 tax laws.

### **SPEAKERS:**

#### **RYAN FLOOD, CAP, FCEP**

Planned Giving Specialist

THE FOUNDATION

#### **CHARLES DAVIS III**

Associate, N.C. Board Certified Specialist in  
Estate Planning & Probate Law

POYNER SPRUILL LLP

### **2021 IN-PERSON SEMINARS:**

Check with your Parish Office for  
upcoming in-person Seminars.

### **HOW TO REGISTER:**

**Go to [www.FoundationDOR.org](http://www.FoundationDOR.org) for more information OR call 919-568-1065.**

**This Webinar is online and is free to attend.**