

Personal Finance Giftmarks

- Make gifts.
- Prepare will.
- Execute a financial durable Power of Attorney.
- Secure life insurance to provide for loved ones and life end goals.
- Save on taxes.
- Create living trust during life that will avoid probate.
- Create trusts at end of life.
- Extend benefits to future creditors.
- Retain property in your family.
- Preserve property in case of failed marriages.
- Obtain professional management and financial services.
- Get professional financial advice.
- Carry out beneficiary designations for 401k, IRA, & retirement plan.
- Donate organs for medical use (transplant and research)?
- Prearrange funeral, burial, and/or cremation.
- Design/choose monument.
- Write own epitaph?
- Write own memorial service?
- Plan memorial gathering?

Family Giftmarks

- Provide for family.
- Avoid family feuds.
- Encourage selected values.
- Transfer business interest.
- Establish family traditions.
- Help relatives through tough times.
- Compensate for tragedy or misfortune.
- Care for parents.
- Encourage education.
- Encourage work ethic.
- Reward and teach family loyalty.
- Continue the family name.
- Do the unexpected.
- Take trips with the family.
- Provide funds to trace family genealogy.
- Take photos to document.
- Demonstrate importance of small gifts.
- Teach importance of spending time together.
- Write agreements and transfer family business interest.
- Provide life insurance.
- Train family members in management duties.