

Do you have the most current estate plan that best meets your goals?

Prisma Health Midlands Foundation is pleased to extend a special invitation to you to learn whether you have the most current estate plan that best meets your goals. The Foundation has contracted with Thompson & Associates (T&A) to provide charitable estate planning expertise to a select group of donors *at no cost*.

T&A is a national leader in estate planning, and its team has nearly 250 years combined experience in non-profit executive leadership and charitable estate planning. The firm was founded in 1997 and is led by Dr. Eddie Thompson, an entrepreneurial visionary with more than 25 years experience as a non-profit executive. T&A serves non-profits around the country, which includes hospital foundations, academic institutions, independent schools and social service organizations. All information shared with T&A remains strictly confidential, and the Foundation will never have access to your personal information. Should you ultimately choose to leave a gift to Prisma Health Midlands Foundation, the Foundation will never know unless you (the donor) decide to inform us.

Thompson & Associates will—

- Provide sophisticated estate planning services and expertise to your team of advisors—CPAs, attorneys, financial planners, etc.
- Help you clarify estate goals and objectives through a values-based questionnaire
- Write a Personal Financial Philosophy for you based on information from your completed values-based questionnaire
- Quantify your Social Capital—the portion of your estate that is unavailable to you and your heirs and will otherwise be used to pay estate and income taxes at death
- Provide a spreadsheet that outlines your estate goals and objectives; provide recommendations to help you meet your goals, and list expected outcomes
- Provide a spreadsheet that outlines your existing estate plan and recommendations using present value calculations
- Illustrate how you can transfer more wealth to your heirs while significantly reducing estate taxes and providing for charity(ies) of your choice
- Using a donor centered model, T&A's process is not about making "the gift" to Prisma Health Midlands Foundation. It is about helping you meet your estate goals and objectives and educating you about the benefits of gift planning.
- Review your existing estate plan to confirm it is the best that it can be in meeting your goals

Thompson & Associates has nothing to sell to those who Prisma Health Midlands Foundation invites to take advantage of this free service. T&A does not prepare any legal documents. T&A is compensated by the Foundation to provide these services free of charge with no obligation. T&A is not compensated based on the number or size of gifts directed to the Foundation. T&A's goal is to help the Foundation become a leader in gift planning services by educating planned giving prospects about the benefits of gift planning and navigating them through the complicated field of estate planning. T&A will review an existing plan to ensure that it is current based on the latest tax laws so you will be able to maximize charitable estate gifts based on the goals outlined in your confidential questionnaire.



Ron Smith joined Thompson & Associates (then TrustMark Charitable Strategies) in 1999 as a Regional Director. He is now President of Associate Relations with Thompson & Associates and provides consulting services to nonprofit organizations located throughout the states of Alabama, Florida, North Carolina, Georgia, Florida and South Carolina. He began his career with nonprofits in 1995 as Vice President for Lads to Leaders, Inc. He developed the organization's fundraising strategy from the grass root beginnings, which included Direct Marketing, Personal Solicitation, and Special Events. Later as Executive Director, Ron was given the responsibility for all aspects of the organization. Learn more at CEPlan.org.