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Beneficiary Designation Gifts

Simple ideas to protect your loved ones and create your legacy.

With just a little planning, you can have peace of mind knowing you have taken care of your family and secured their future.

One of the most effective ways to care for your family is with a current estate plan, no matter your age. If you own property, have dependents or have recently experienced life changes (marriage, divorce, births, deaths, etc.), you will want to download our [Estate Planning Guide](#) and complete it before visiting an estate planning attorney to create or update your will and/or trust documents.

The good news is there is much planning you can do without ever visiting an attorney. For example, you can designate a beneficiary for your retirement assets and insurance plans typically by completing a simple form from your plan administrator or website. You can also add a family member to your savings, checking or investment account(s) and your funds will pass automatically to them when you pass away. If you are especially concerned about taxes, contact us to see how including Anderson University in your plans can help you leave your legacy, while also reducing taxes for yourself, your family or your estate. Reach out to me by email at jshirley@andersonuniversity.edu or call 864-622-6079. You can also visit our [Planned Giving website](#) for more ways to protect and provide for your loved ones.

Your loved ones need you, and you need to have the peace of mind of knowing that they will be ok if you are not there. It benefits everyone to Be Tax Wise!



Johnna Shirley

Associate VP of Philanthropy and Estate Planning

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