Estate Review

Wheaton College Gift Planning Services

For those who have a heart to support Wheaton's ministry through their estate plan, our Gift Planning staff is available to help you think through your current estate plan and whether it accomplishes your goals, while providing suggestions for charitable estate giving, which may achieve some tax reduction. This will help prepare you to have more effective and efficient communication with your professional advisors.

What You Can Expect from the Process:

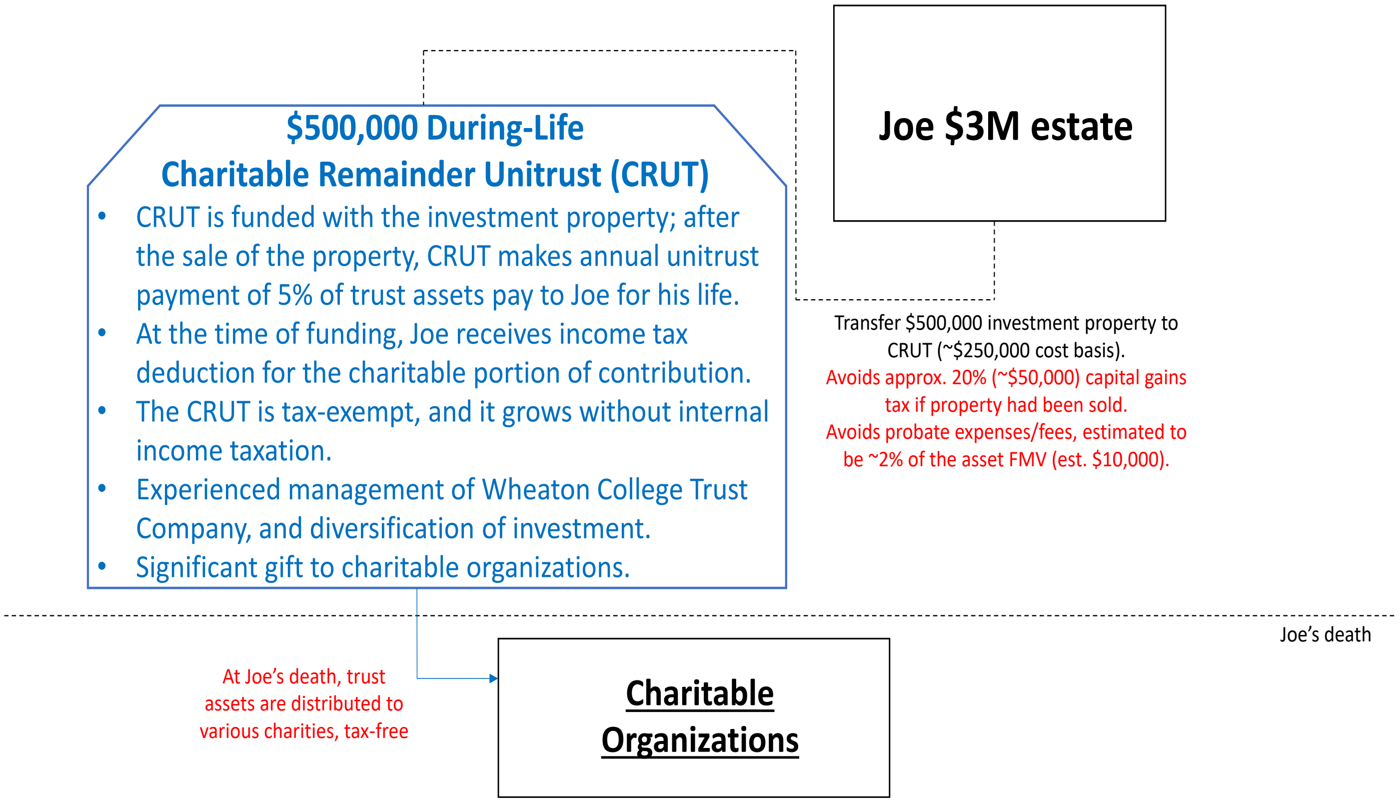
- We will provide you with an Estate Review Questionnaire to complete, which will assist you as you consider the assets you own, how and to whom you want to distribute them, and which assets are best suited for strategic charitable giving (providing tax reduction).
- After reviewing your Estate Review Questionnaire and current situation, our Gift Planning staff will set up time with you to discuss with various concepts, including:
    - Whether your current plan aligns with your current goals.
    - Charitable giving tools that may help maximize giving to loved ones and charity.
- Finally, we will follow up with written communication to summarize the points discussed as needed to help you accomplish your strategic charitable goals.

Based on your specific situation, we will provide relevant resources and material, including flow charts, strategic giving information, a Last Wishes planning worksheet, and other personalized illustrations.

Note: there are many charitable giving tools that may be considered or beneficial, based on the circumstance.

On the next page is a flow chart showing how utilizing a charitable vehicle like charitable remainder unitrust (CRUT) offers many benefits to donors, such as a lifetime income flow, an immediate partial charitable income tax deduction, avoidance of capital gains taxes, and a significant gift to charity at the end of the trust.

Joe Wheaton



The following tools and services may be included in the discussion, based on your particular situation, and we can provide information sheets on each if helpful:

1) Gifts other than cash
2) Gift annuities
3) Charitable remainder unitrusts
4) Donor advised funds
5) Outright gift or retained life estate of a personal residence or farm
6) Wheaton College Trust Company

Please contact the Gift Planning Services team or your Development representative if you would like an Estate Review or for more information.

The information herein is not intended as legal, tax, or financial advice. Please consult with your attorney, financial or tax advisor for advice specific to your circumstances.