Estate Planning

FIDELITY CHARITABLE SERVICES®

Client Clue	Discussion Segue	Cues and Clues (detailed examples*):
• Indicates estate planning is **area of concern** • Is in process of **putting estate plan together** • Designating a **charity as IRA or estate beneficiary** • **Annual gifting** to children or grandchildren • Reregistering **assets**	• Is charitable giving a **component** of your estate plan? • What **type of charitable giving** is part of your estate plan? • Would you like to **establish a tradition** of giving for your family? • Did you know there are some creative ways to **reduce the size of your estate** while benefiting the charities you care about most?	SAMPLE #1: DISTRIBUTION As you're thinking about your estate plan, have you thought about the charities to which your money should be distributed, when to distribute it, and which vehicles you want to use? SAMPLE #2: MINIMIZING ESTATE TAX Now that you've maximized your annual gift exclusion, one of the other ways to potentially **reduce your estate** is by giving to charity.

For more information on Fidelity Charitable Services,® call 1.800.280.6357
or visit www.fidelitycharitableservices.com.
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*These sample dialogues are to be used as a basis for you to develop your own communication style with clients. These samples are not to be used as scripts—they should not be presented verbatim to clients/prospects.

At all times you should note that rules regarding tax deductions for charitable giving vary at the state level. Tax deductions discussed herein refer specifically to federal taxes.

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