

Values-Based Estate Planning

A Complimentary and Confidential Opportunity

VALUES-BASED ESTATE PLANNING IS A PERSONALIZED PROCESS

Develop an estate plan that highlights your values, directs your priorities, outlines your intentions and protects your assets.

As a benefit to Zoo friends, the Planned Giving program offers confidential, comprehensive estate planning at no charge and with no obligation. Using planning resources available through one of the nation's leaders in charitable estate planning, Thompson & Associates, our advisor Michael Geis will personally guide you through a thoughtful process to help structure your estate plans according to your wishes.

If you already have an estate plan, Michael will provide an unbiased review. An estate plan is never "final" until its creator can no longer change it. Changes in assets, interests, family situations and tax laws necessitate regular review and update to assure that your plan best addresses your priorities. (continued on back)



Michael Geis is a Senior Vice President with Thompson & Associates and a consultant with the Saint Louis Zoo. He is devoted to helping individuals make estate plans that meet their personal objectives.

Thompson & Associates does not draft legal documents, manage money, sell any products or ask you to make a gift. All information you provide is kept in confidence.

"We are impressed by how Thompson & Associates approaches estate planning. We found the Zoo's consultant, Michael Geis, a joy to work with. It is an invaluable service for people trying to figure out their plans as well as for folks like us who already have a plan. The step-by-step process put us in the driver's seat and provided good ideas to achieve what we wished.

*-Rich and Nancy Marston
Heritage Society Members of
the Saint Louis Zoo*

For more information or to schedule an appointment with Michael Geis, please contact Lori A. Sullivan, Director of Planned Gifts, at 314.646.4509 or email sullivan@stlzoo.org

A gift to you from the Zoo Values-Based Estate Planning

HOW THE VALUES-BASED ESTATE PLANNING PROCESS WORKS:

Introductory Meeting — an introductory meeting with Michael is arranged. If you choose to continue the planning process following your initial meeting, Michael will meet with you 3 to 6 times in total to complete the process. He visits the Zoo monthly.

Your Estate Planning Goals and Objectives — After completing a simple questionnaire, Michael will work with you to help clarify your estate planning goals. Goals may include financial needs for you, your spouse/partner and heirs, including special needs situations. Planning also includes making tax-wise decisions in achieving your personal legacy and charitable goals.

Personal Philosophy Statement — From the information gathered, a Personal Financial Philosophy statement is developed that confirms and restates your values and objectives.



Estate Asset Review — A Net Worth Statement will be created to aid in the development of a comprehensive estate plan. All information is kept in confidence.

Plan Development and Review — Using the Personal Financial Philosophy statement, you will be presented with estate planning options that meet your personal objectives. If you desire, Michael will meet with your professional advisor(s) to discuss the recommendations. You are welcome to invite your advisor(s) to attend your meetings with Michael.

Plan Implementation — Now equipped with a framework, you are ready to work with your advisor(s) to implement your personalized values-based estate plan, and enjoy peace of mind that your wishes will be honored.

