

Marketing Materials

Each seminar includes a coordinated marketing campaign that contains the following components:



Flyer



Invite



2 Page Letter



Postcard

Scroll this document to see all marketing campaign components.

Help Protect Your Estate Assets and Avoid Unintended Consequences



Like many people, you may hope to leave a substantial legacy for your loved ones and charitable causes. But without proper planning and the appropriate financial strategies, you may not be able to protect your assets from probate and other unintended consequences. As a result, your estate may be settled in ways you did not intend.

Join us for an educational workshop where you'll hear about:

- **Calculating the value of your estate**
- **Benefits of estate conservation**
- **Intestacy and how it affects estate distribution**
- **Probate and how to potentially avoid it**
- **Current federal estate tax provisions**
- **Strategies that could help reduce taxes**
- **Step-up in basis rules on inherited assets versus carryover basis rules on gifts**
- **Estate distribution techniques, including wills, trusts, and charitable giving**

When you attend the workshop, you will receive a full-color, 20-page workbook on estate planning. This resource is filled with essential information, exercises, and questions that may help you assess your current situation and develop a strategy that may help preserve your assets. Perhaps best of all, you'll be eligible for the complimentary consultation offered to all workshop participants.

Estate Conservation

sponsored by

(YOUR COMPANY'S NAME)
(BRANCH OR OSJ ADDRESS, IF APPLICABLE)

will be held on

(DAY, DATE)
from (TIME) to (TIME)
at (LOCATION).

Reserve your seat and your full-color workbook today!
Call (YOUR PHONE NUMBER).

(Place any necessary disclosure here)

Preview

**Help Protect
Your Estate Assets
and Avoid
Unintended
Consequences**



Like many people, you may hope to leave a substantial legacy for your loved ones and charitable causes. But without proper planning and the appropriate financial strategies, you may not be able to protect your assets from probate and other unintended consequences.

As a result, your estate may be settled in ways you did not intend.

You are invited to an educational presentation that focuses on strategies to help preserve your estate.

Preview

Estate Conservation

will be held on

(DAY, DATE)
(TIME) to (TIME)
(LOCATION)

To reserve your place, call

(PHONE NUMBER)
by (DATE).

(YOUR FIRM'S NAME)

(YOUR COMPANY'S NAME OR LOGO)
(YOUR COMPANY'S ADDRESS)

Help Protect Your Estate Assets and Avoid Unintended Consequences

(DATE)

(NAME)
(STREET ADDRESS)
(CITY, STATE, ZIP)

Dear (NAME):

Like many people, you may hope to leave a substantial legacy for your loved ones. But without proper planning and the appropriate financial strategies, you may not be able to protect your assets from probate and other unintended consequences. As a result, your estate may be settled in ways you did not intend.

Consider these factors:

- **Federal estate tax rules have changed.**
- **Many states and the District of Columbia have an estate tax and/or an inheritance tax.**
- **If you don't have a will, probate could tie up your estate for several months to a year or more.**
- **The court may decide guardianship of your minor children if you don't have a will or a trust.**
- **How step-up in basis rules on inherited assets and carryover basis rules on gifts could affect your gifting strategies.**

Fortunately, you may be able to avoid many of these potential problems. By using sound strategies, you can help ensure that your intended beneficiaries inherit your property, cash, investments, savings, and business interests. You can also control important decisions such as who will be the executor of your estate and the guardian of your minor-age children.

I am presenting an educational workshop, *Estate Conservation*, on (DAY, DATE) from (TIME) to (TIME) at (LOCATION). There's no cost to attend this workshop and there is no obligation. It is an educational presentation sponsored by my firm, (YOUR FIRM'S NAME), and no products or services will be offered for sale.

You will receive a FREE estate conservation workbook at the workshop. This 20-page resource is packed with information, exercises, and questions that could help you develop strategies for preserving your estate. This workbook was prepared especially for our *Estate Conservation* workshop, so it contains important information you'll want to remember from the presentation.

The workshop is a lively, easy-to-understand presentation. I'll present the latest facts, figures, and tax rules and show you strategies that may help you pursue your goals.

In just a little more than an hour, we will focus on:

- **Calculating the value of your estate**
- **Benefits of estate conservation**
- **Intestacy and how it affects estate distribution**
- **Probate and potential ways to avoid it**
- **Estimating your estate tax liability**
- **Current federal estate tax law**
- **Strategies that could help reduce taxes**
- **Estate distribution techniques, including wills, trusts, and charitable giving**

As a follow-up to the workshop, you will be offered a complimentary consultation to discuss your individual situation. This follow-up meeting is a great way to evaluate your options and to discuss questions you may have after the workshop.

I hope you will take advantage of this excellent opportunity. You are welcome to bring a guest, but seating is limited, so call (YOUR PHONE NUMBER) today to reserve your place and your workbook.

Sincerely,

(YOUR NAME)
(YOUR TITLE)

Help Protect Your Estate Assets and Avoid Unintended Consequences



Preview

If you hope to leave a legacy for your loved ones, you don't want to miss this opportunity. Join us for an educational workshop where we'll focus on sound strategies that could help you preserve more of your wealth for your heirs and charitable causes.

Estate Conservation

(DAY, DATE)

(TIME)

(LOCATION)

Call (YOUR COMPANY'S NAME)
at (PHONE NUMBER) to register.

(Disclosure Goes Here)