

Lasting Legacies

Spring 2022



Take Control by Planning Ahead

Can't predict what's next? It's tempting to put planning on hold. Unfortunately, loose ends can lead to future stress and rash decisions.

Consider this: Planning under "normal" circumstances allows you to slow down and review your options. For example, taking the time to be mindful when creating an estate plan gives you the opportunity to record your values and make sure your wishes are followed. A thoughtful estate plan can also tell your story through the causes you support after your lifetime.

A well-planned estate helps you:

- **Make the most of your assets.** Meeting with qualified professionals helps you grow your wealth over the long term.
- **Protect family and loved ones.** Regularly reviewing your estate plan makes it easier to adjust for changes in personal relationships, tax laws, births, deaths and state of residence.
- **Be tax smart.** Certain assets can be tax burdens (or at least tax surprises) to your family. Planning helps you keep them in the loop and possibly avoid a tax hit altogether.
- **Continue helping others after your lifetime.** Gifts to the Tidewell Foundation, Inc., may provide you financial benefits in addition to the fulfillment that comes from helping others.

We Can Help

By planning your estate now, you not only support your loved ones, but you also ensure the organizations you care about, like the Tidewell Foundation, continue to receive your support. Contact Debbie Mason at dmason@tidewellfoundation.org or (941) 552-7546 to learn more about including us in your future plans.



7 Items Your Estate Plan Left Out

If you're taking another look at your existing estate plan, or just starting your planning journey, be sure to include the following items—in addition to a will—to make things easier for you and your loved ones. In most cases, you won't need to involve an attorney.

Be Sure You Have:

1. A high-level overview that lays out the basics of your finances and plans. Include:

- Where to find your will and other documents, and who the key people are—your agents under the powers of attorney and executors or personal representatives.
- Financial assets (where accounts are held and who owns them).
- Insurance coverage (property/casualty, health, life).
- Property and vehicle information.
- Regular household bills that you pay.

2. A detailed description of your finances (account numbers, contacts at financial institutions, etc.).

3. A personal property memorandum that is referenced by your will and states how you

want property distributed and/or sold. This allows you to assign sentimental or valuable assets to specific people without having to update your will if you change your mind.

4. A plan for your pets to ensure that your furry friends are taken care of. A legally binding pet trust can be created, or you can make provisions in your will for how you want your pets cared for in your absence.

5. Your digital estate plan, which includes online account details.

6. Advance directives, powers of attorney and other end-of-life planning tools to communicate your basic wishes. Add personal messages and detailed plans for your funeral, memorial and other specifics.

7. An ethical will, which is your opportunity to hand down your values in a document or video. Think of it as a personal record of your life—how you've lived it and how you want to inspire others.

Explore Your Legacy at the Tidewell Foundation

Wherever you are in the process, your estate plan is a powerful way to show your love for your favorite causes, such as Tidewell. Please contact Debbie Mason at dmason@tidewellfoundation.org or (941) 552-7546 to learn more about including the Tidewell Foundation in your future plans.

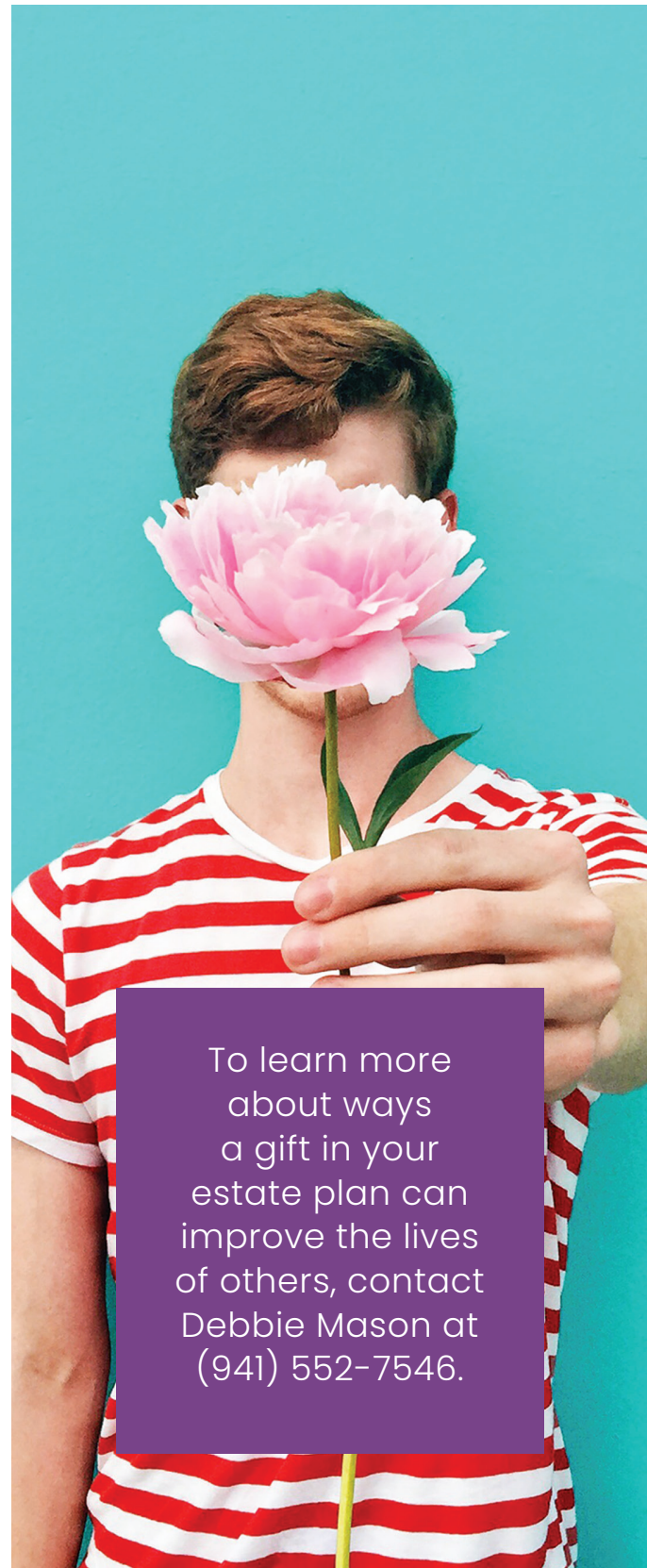
Write Your Philanthropic Autobiography

Taking time to think about and document what's important—and why it's important—can help you connect more deeply with the people and places you hold dear.

Here are some ideas for how you can forge more meaningful connections and pass along your generous spirit.

- Have you done an activity recently that made you happy? Consider a cause related to that activity. For example, if you enjoy a particular hiking trail, find a local conservation group to support.
- If you feel connected to a current event, see if nonprofits you support are responding and ensure they are set up for success.
- Go beyond dollars and cents. Volunteering is a great way to give back, especially for local charities that may not have the administrative staff that their larger counterparts have. Also, inviting friends and family can be an effective way to introduce them to your passions.
- Your values can unlock others' generosity. Letting loved ones know what you care about can help you connect. It could even bring them to support the causes you cherish.

Tell your story by keeping a running document (a generosity journal or ethical will) that gives an account of who you gave to, why you gave to that nonprofit, how it made you feel and how that nonprofit's mission fits into your overall value system.



To learn more about ways a gift in your estate plan can improve the lives of others, contact Debbie Mason at (941) 552-7546.



Don't Leave Them in the Dark

Help your loved ones find key documents and contact information if you're absent. Return the enclosed reply card to request **Your Guide to Locating Important Documents**, FREE!

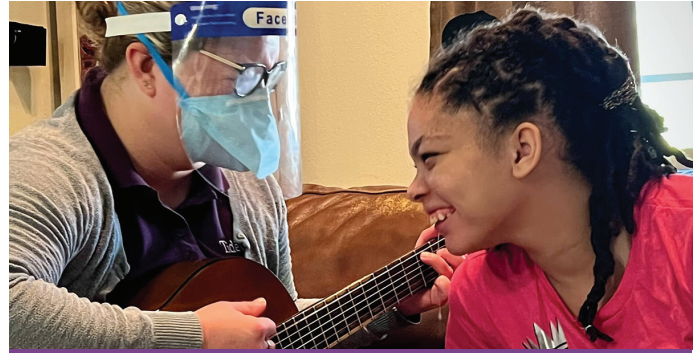
Music Therapy Builds Skills and Joy for Tidewell Patient

Gifts from generous donors to the Tidewell Foundation provide grants to Tidewell Hospice's innovative programs and services, such as the music therapy program.

Tidewell has three dedicated music therapists who serve patients of all ages. Chandrea Owens-Hicks, 14, a Tidewell patient for five years, has benefited from music therapy for the last 18 months.

Chandrea suffers from Aicardi syndrome, a disorder marked by missing or underdeveloped tissue connecting the left and right halves of the brain. Chandrea enjoys things that normal teenagers like, but her grandmother shares that she responds to stimuli much like a 1-year-old.

Tidewell music therapist Sarah Michaels plays songs on the guitar and encourages Chandrea to move to the music. Chandrea enjoys playing the drum and plucking the guitar strings while Sarah plays. She chooses the songs Sarah plays by pushing a yes or no button. Sarah works on Chandrea's fine-motor skills and communication as well as movement. Chandrea doesn't like



Sarah Michaels provides a therapeutic skill-building session with patient Chandrea Owens-Hicks.

opening her left hand, so clapping and drumming are important skills.

Jen Hicks, Chandrea's grandmother says, "When you have a special needs (child), everybody starts out wanting to help, then all of a sudden there's nobody around. You find yourself alone. It's nice to have that (music therapy) because those are people who directly impact her life. It's people who are part of her daily life that she looks forward to."

There for Those in Need

Leaving the Tidewell Foundation in your estate plan is a powerful way to invest in world-class care by Tidewell Hospice. For more information contact Debbie Mason.



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If you want to be removed from our list please contact Jane Freitas at (941) 552-7502 or jfreitas@tidewellfoundation.org.

The Tidewell Foundation, Inc. is a registered 501(c)(3) non-profit corporation. A copy of the official registration and financial information may be obtained from the division of consumer services by calling toll-free 1-800-435-7352 (or 1-800-352-9832 en espanol) or going on the department's website www.floridaconsumerhelp.com. Registration does not imply endorsement, approval, or recommendation by the state. One hundred percent (100%) of the donation is received by the Tidewell Foundation, Inc. Charitable Solicitation Registration #CH63240.