



Welcome!


Leveraging National Initiatives

2 Local Success Stories

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Leave 10 South Sound is an Initiative created by local Nonprofits, Professional Advisors, and Donors to educate, encourage and inspire people in the South Puget Sound region to leave at least 10% of their estates to the charities and causes they believe in.



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With generous support from:

Greater Tacoma Community Foundation

The Community Foundation of South Puget Sound

Ben B. Cheney Foundation

THANK YOU!

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National Estate Planning Awareness Week

October 21 – 27 2024

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National Estate Planning Awareness Week

2024 LOCAL ACTIVITIES & PROMOTION

- KBTC on-air spots
- Announcement at Rotary 8
- Pierce County Libraries promotion
- Social media posts
- Leave 10 South Sound Basic Estate Planning 90 minute special



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Resources for you and your donors

Leave 10 South Sound website

- Link to NEPAW materials, formats, promotional pieces, sample email, & more
<https://www.leave10.org/south-sound/for-nonprofits-ss/mawm-nepaw/>
- Estate Planning Guide helps your donors get started
- Link to Will & Estate Planning Software (ie. FreeWill, Legal Zoom, etc)
- Link to professional advisors who are Champions (Champions page)

Mentors and helpers

- Leave 10 South Sound Steering Committee
- South Sound Planned Giving Council
- Greater Tacoma Community Foundation
- The Community Foundation of South Puget Sound

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Why is this so important?

Disturbing Trend – Post Pandemic

-- Caring.com 2024 Wills Study --

- Only 32% of Americans have a will, a 6% decline from 2023 and the first decrease in estate planning rates since 2020.
- Since 2023, 14% more U.S. adults give “a lack of assets” as their reason for neglecting estate planning.
- The number of White Americans with a will decreased by 3% since 2020, while estate planning among Black Americans increased by 19% since 2020.
- Young adults aged 18-34 are the only age group that has not seen a decline in estate planning rates since 2020.

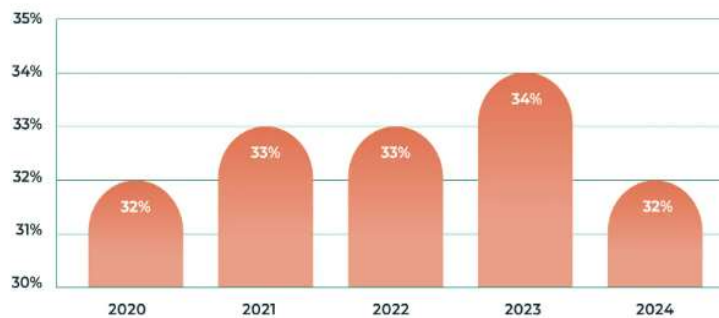
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Why is this so important?

Fewer Than 2 out of 3 U.S. Adults Have a Will – The Lowest Rate Since 2020

The Prevalence of Estate Planning in the U.S.

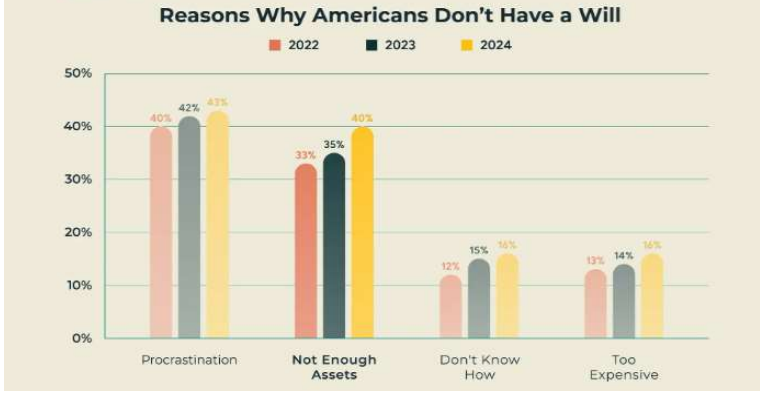


2024 Caring.com Wills Survey

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Why is this so important?

4 out of 10 Say They Don't Need a Will Because They Are Too Poor - An Increase of **21%** Since 2022

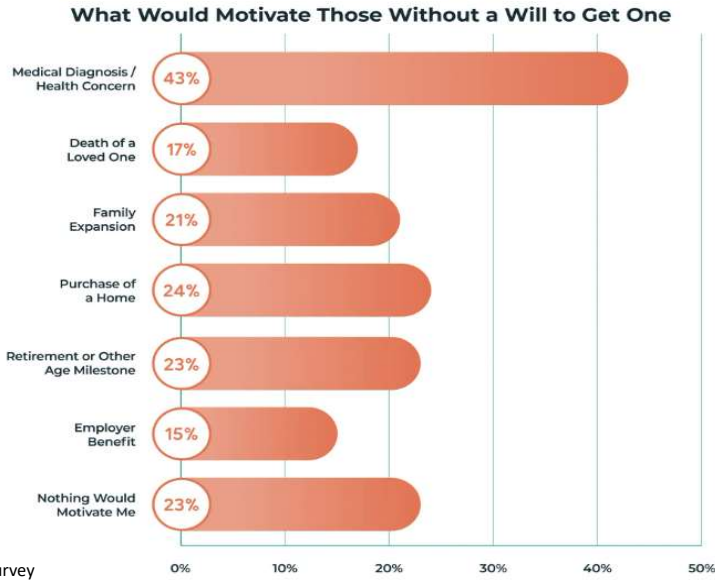


2024 Caring.com Wills Survey

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1 out of 4 Americans Without a Will Don't Ever Plan on Getting One, While Over **40%** Plan on Waiting Until a Health Crisis

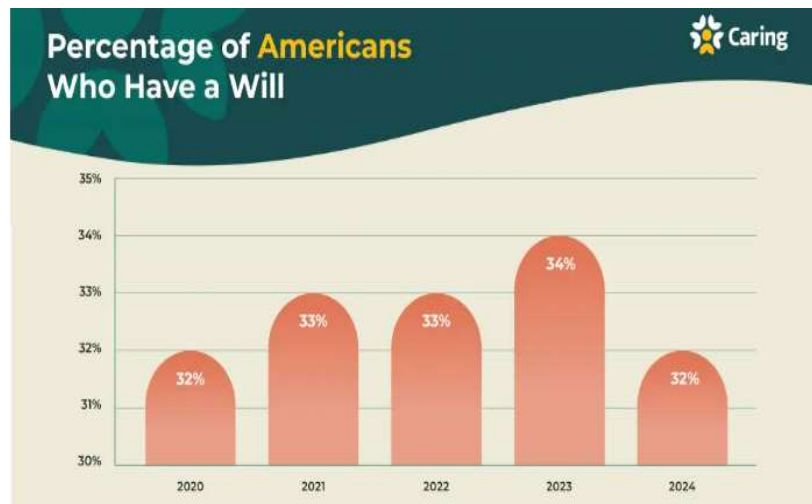


2024 Caring.com Wills Survey

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Why is this so important?



2024 Caring.com Wills Survey

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National Estate Planning Awareness Week

NEPAW Basic Estate Planning Program

Securing Your Wishes:

Where there's a Will, there's a way!

Thursday, October 24, 2024

11:30 am – 1:00 pm

Live on ZOOM and YouTube Stream

FREE to Nonprofits, Professional Advisors,
Board members, and Donors.



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None of Us Got Here All by Ourselves

Anyone who has ever been able to sustain good work has had at least one person—and often many—who have believed in him or her.

We just don't get to be competent human beings without a lot of different investments from others.

- Fred Rogers

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Securing Your Wishes: Where there's a Will, there's a way

- National Estate Planning Awareness Week (NEPAW)
October 21 – 27, 2024
- **Securing Your Wishes:** Where there's a Will, there's a way
Basic Estate Planning made easy and understandable
LIVE October 24, 2023; 11:30 am – 1:00 pm
Free on ZOOM or YouTube Stream
- Leave 10 South Sound Program Content presented by
a Lauren Pitman, JD; Pitman Huff Raedel Magaro Lifetime Legal, PLLC

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Securing Your Wishes: Where there's a Will, there's a way

Lauren Pitman, JD

Pitman Huff Raedel Magaro Lifetime Legal, PLLC

Education:

- J.D. Seattle University School of Law (with honors)
- B.A. Cornell University

Associations/Recognition:

- Thurston County Bar Association
- Washington State Bar Association



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Securing Your Wishes: Where there's a Will, there's a way

Associations/Recognition: (cont.)

- National Association of Elder Law Attorneys, Real Property, Probate, and Trust Section
- Elder Law Section, Washington State Bar Association
- Board member, Mayday Foundation
- Executive Committee, South Puget Sound Estate Planning Council
- Executive Board, Senior Action Network of Thurston and Lewis Counties
- Past Board President, Hands on Children's Museum



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National Estate Planning Awareness Week October 21 – 27, 2024

How have nonprofits used this initiative to their advantage?

Two Local Success Stories – what thought & effort can bring:

Dean Carrell CAP, Foundation Director
Pierce County Library System

Sherrana Kildun, Chief Philanthropy Officer
Tacoma Pierce County Habitat for Humanity

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YOUR QUESTIONS



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Securing Your Wishes: Where there's a Will, there's a way

October 24, 2024 11:30 am – 1:00 pm

- Program is 50 minutes on Basic Estate Planning
- Available to Nonprofits, their Board of Directors, Professional Advisors, & Donors
- Presented by the Leave 10 South Sound Initiative
- In *real-time* on both Zoom and YouTube Stream

- Final 30 minutes includes panel of Local Professional Advisors to help field questions from the audience
- Panel will fill with information on the importance of good Estate Planning and how it effects each discipline

This is *Live*, local content in support of National Estate Planning Awareness Week

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Securing Your Wishes: Where there's a Will, there's a way

October 24, 2023 11:30 am – 1:00 pm

1. Register yourself first
2. Decide WHO to invite (staff, board members, your CEO, peers)
3. Decide HOW you want to participate:
 - 1) just have everyone register for ZOOM, or
 - 2) do something special, like host a meeting and project the ZOOM or YouTube stream at your organization or offsite location
4. Use the Leave 10 South Sound Website and handouts for ideas on how best to invite those you think would benefit
5. Send email invites, use Social Media, and for special donors and donor prospects, consider a personal letter inviting them or even a phone call

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Securing Your Wishes: Where there's a Will, there's a way

October 24, 2023 11:30 am – 1:00 pm

Leverage this National Initiative to your benefit!

- It's Easy to participate, and it's good for you and your organization, your Board, co-workers, and especially donors who are over 45 and need to think about making their plans
- You are encouraged to create your own materials and email invites to communicate the importance of having an updated Will.
- Invite everyone to join the ZOOM meeting on Oct 19th. And the opportunity to learn about Basic Estate Planning (donors especially, need to be proactive.)
- Remember: *Generally Speaking: No Will, No Gifts to your nonprofit!*

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THANK YOU to our special guests today:

Dean Carrell CAP, Foundation Director;
Pierce County Library System

Sherrana Kildun, Chief Philanthropy Officer
Tacoma Pierce County Habitat for Humanity

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**Securing Your Wishes:
Where there's a Will, there's a
Way!**

October 24th, 11:30 – 1:00 pm
Live on ZOOM and YouTube

Register HERE*

* <https://forms.gle/VZhaV2StGeQkkwZ48>



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Thank You

**For your interest in
Leave 10 South Sound Initiative**

*and Participating in
National Estate Planning
Awareness Week*

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