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Welcome and thank you for joining us! The program will begin soon

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The Carter Center Presents:

***How Much Is Enough To Leave Your Loved Ones
With Guest: John A. Warnick, Esq., Founder of the Purposeful
Planning Institute***

Hosted By: Barry Nickelsberg, CAP, Chief Development Officer for Estate & Gift
Planning

&

Mark N. Williams, Esq., CAP, Senior Associate Director

Thank You

Our work together continues to improve the lives of millions of people, and we cannot thank you enough for your ongoing support.

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Thank You for Your Trust

We would also like to express our gratitude for allowing us to serve as your resource; it is a privilege to be trusted to provide you with information about these important topics.



DISCLAIMER

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John A. Warnick, Esq.

- **Founder, Purposeful Planning Institute**
- **Career in wealth, tax and estate planning**
- **Thought leader in the field of Purposeful Trusts & Gifts**
- **Author of two Bureau of National Affairs Tax Portfolios**



How Much Is Enough To Leave Your Loved Ones

Overview

- Introduction
- Charity Starts at Home, Right?
- A Conversation for All
- Getting Started



Introduction

- How best to care for our loved ones when we are gone is often the question we seek to answer with estate planning
- But often, we fail to have important conversations that could better guide our estate planning, and our loved ones



Introduction

- **Warren Buffett:** “You should leave your children enough so they can do anything, but not so much that they can do **nothing**” (source: <https://www.forbes.com/sites/angelauyeung/2018/06/01/warren-buffetts-advice-on-how-to-raise-well-adjusted-heirs?sh=7822770b712f>)
- **Bill Gates:** “Leaving kids massive amounts of money is not a favor to them.” Warren Buffett was talking to Fortune about this, and it made me decide he was right (source: <https://www.independent.co.uk/news/world/americas/bill-gates-children-inherit-money-b1841790.html>)



Charity Starts at Home, Right?

- Warren Buffett and Bill and Melinda Gates co-founded The Giving Pledge, a voluntary commitment to give the majority of one's wealth to philanthropic causes



Not Just for Billionaires or the Rich

- Thinking about the total value of your assets and making decisions on how to best support loved ones is difficult and may feel overwhelming
- Family dynamics and family experiences may lead to some hesitancy to begin estate planning, preventing us from thinking about or discussing today's subject altogether



Charity Starts at Home, Right?

- Do heir/loved ones' expectations play a role in these conversations?
- What can/should we do about managing the expectations of our loved ones/heirs?



Stories of Everyday People

- It may seem like a subject only for the wealthy, but it is not
- John A., please share about your experiences working with families that have addressed the question of how much is enough?



Getting Started With Your Loved Ones

- Any advice for people who want to begin the discussion today? Or for those who want to start over, or again?
- Do people need to have an attorney to begin thinking about this or discussing it with their loved ones?
- Are there any resources you suggest for people thinking through the question of how much is enough for their loved ones?



Being Purposeful With Your Plan

- When looking for or working with an advisor, how can we ensure this discussion receives sufficient professional attention?



Thank You!
Questions?

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