



Leave a Lasting Legacy with Advance Community

Estate Planning: Secure Your Legacy, Support Your Community

Estate planning helps ensure that your loved ones are cared for, your wishes are honored, and your legacy is protected. At Advance Community, we offer you the opportunity to extend your impact by including us in your estate plans. Your legacy gift can support food security, medical care, health education, and community development programs that uplift people locally and globally.

Consider the following when planning your estate:

- **Wills:** Decide how your assets will be distributed and who will manage your estate.
- **Trusts:** Establish a trust to manage your assets more efficiently and potentially avoid probate.
- **Powers of Attorney:** Choose someone to handle your financial and medical decisions if you're unable to.
- **Beneficiary Designations:** Ensure your retirement accounts, life insurance, and other assets are up-to-date.

How to Include Advance Community in Your Estate Plan

If you'd like to make a meaningful impact through your estate, here's how you can easily include Advance Community in your will or other estate planning documents:

- **Legal Name:** Advance Community
- **Address:** 1911 W Earll Drive, Phoenix, AZ 85015
- **Tax Identification Number (EIN):** #23-7087997

How Your Legacy Can Help:

- **Medical Care:** Support life-changing healthcare services in underserved communities.
- **Food Security:** Provide nutritious meals and fresh produce to aging adults and families.
- **Health Education:** Fund educational programs that promote wellness and healthy living.
- **Community Development:** Enable sustainable development projects that create stronger, self-sufficient communities.



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Estate Planning Checklist

Use this checklist to guide your estate planning process:

- Inventory Your Assets:**
 - Create a list of your assets, including real estate, bank accounts, retirement funds, and personal property.
- Draft or Update Your Will:**
 - Ensure your will reflects your current wishes, including charitable contributions.
- Consider Trusts:**
 - Set up a trust to manage your assets for beneficiaries and avoid probate.
- Choose Key Representatives:**
 - Select an executor, healthcare proxy, and financial power of attorney.
- Review Beneficiary Designations:**
 - Update designations on retirement accounts and life insurance policies.
- Review Regularly:**
 - Review your estate plan every few years or after major life changes (marriage, birth, or a new job).
- Include Charitable Giving:**
 - Consider leaving a legacy gift to Advance Community to support programs that align with your values.
- Consult with a Professional:**
 - Work with an estate planning attorney and financial advisor to make sure your plan is comprehensive.

The information provided here is for general informational purposes only and should not be taken as legal, financial, or tax advice. We encourage you to consult with an attorney, financial planner, or tax professional to ensure your estate plan meets your personal needs and complies with the law.

Advance Community does not offer legal or financial advice, and we recommend seeking guidance from qualified professionals before making decisions regarding your estate planning or charitable contributions.



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