

Gifting qualified plans to charity at beneficiary's death

To gift qualified plans to charity at the beneficiary's death (2nd client's death)

1. Go to the **Estate Planning** category – **Planner** tab. To create an estate planning scenario, click **Duplicate** (Figure 1).

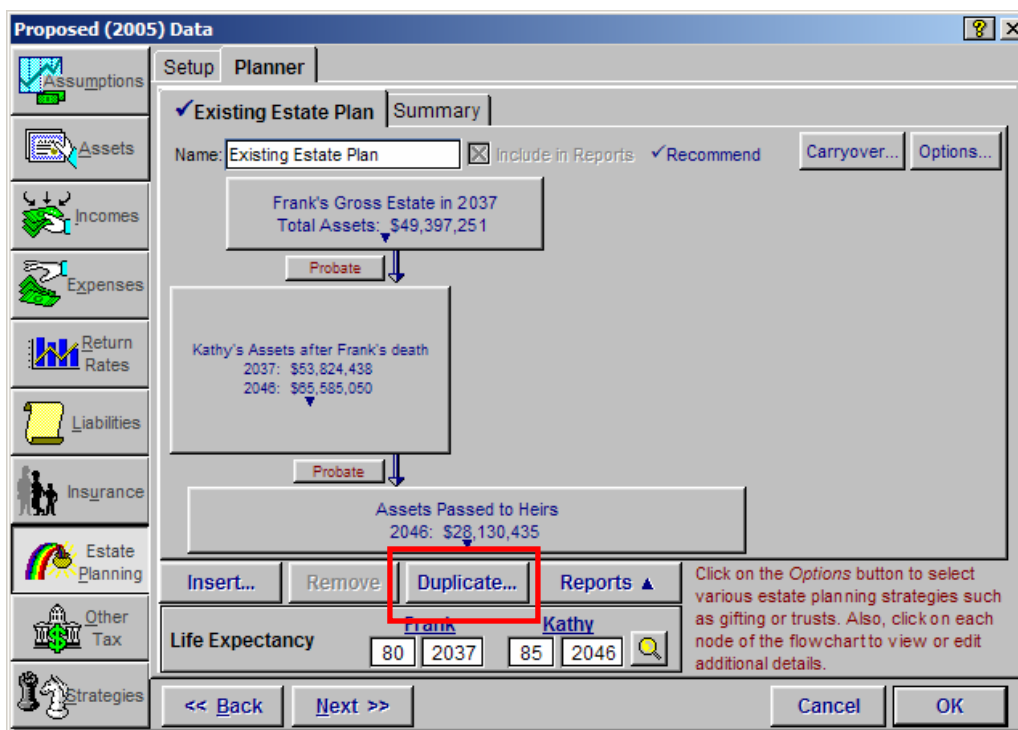


Figure 1

The *Estate Planning Scenario Setup* dialog box opens (Figure 2).

2. Name the scenario, and then under *Estate Planning Tools*, select **Will Exists** and **Gifting** (Figure 2).

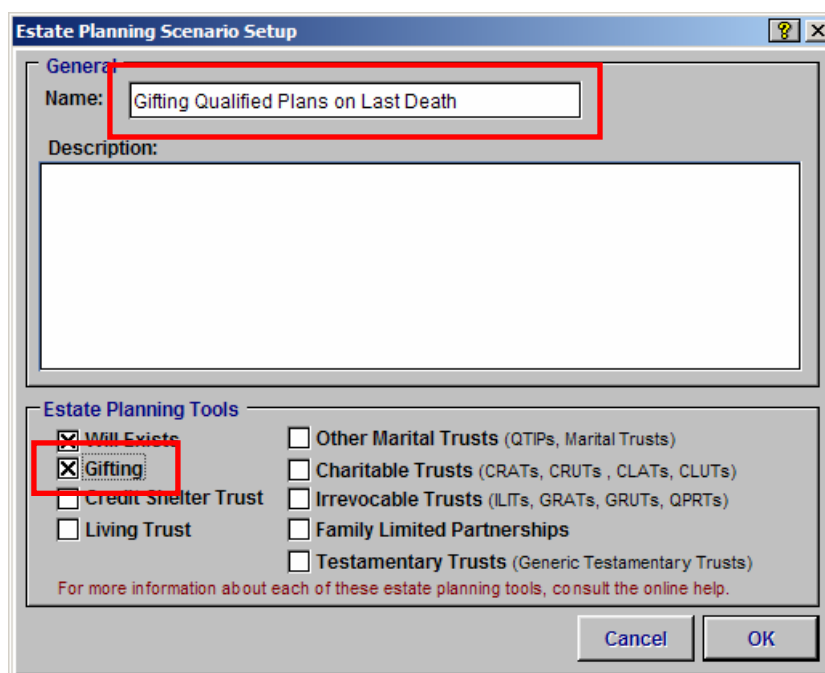


Figure 2

3. Click **OK** to return to this scenario's flowchart (Figure 3).

- Click the top node in the flowchart (Figure 3), and then select **Edit Asset Estate details**.

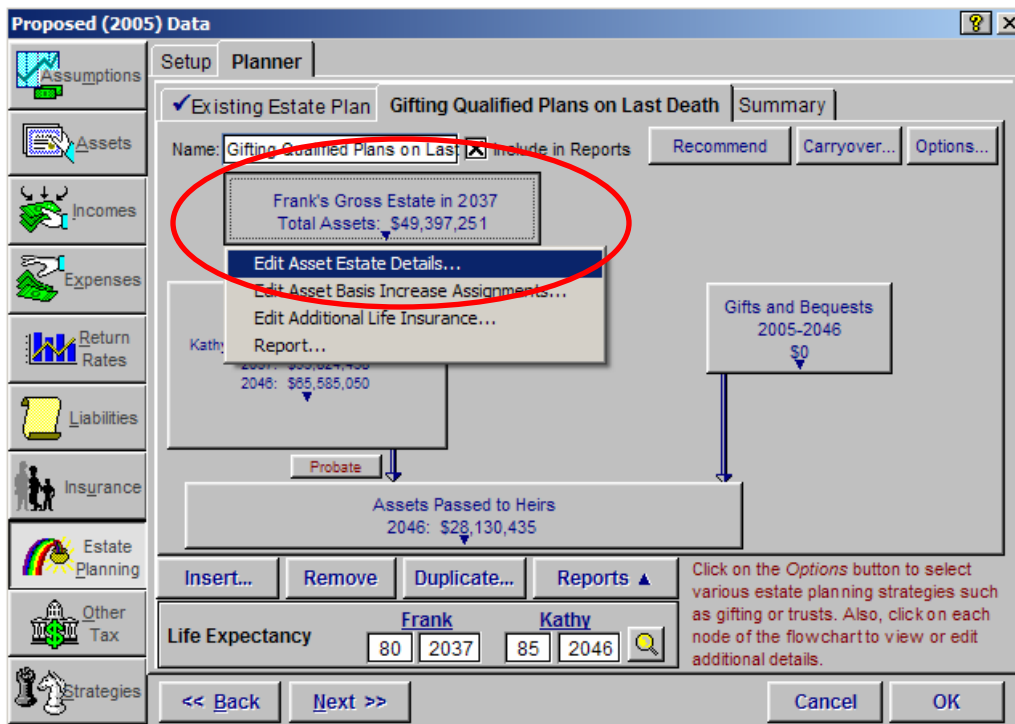


Figure 3

The *Asset Estate Details* dialog box opens (Figure 4).

- Go to the **Qualified & Annuities** tab. Click the **Contingent Beneficiary** cell for the appropriate asset, and then select the intended charity (Figure 4).

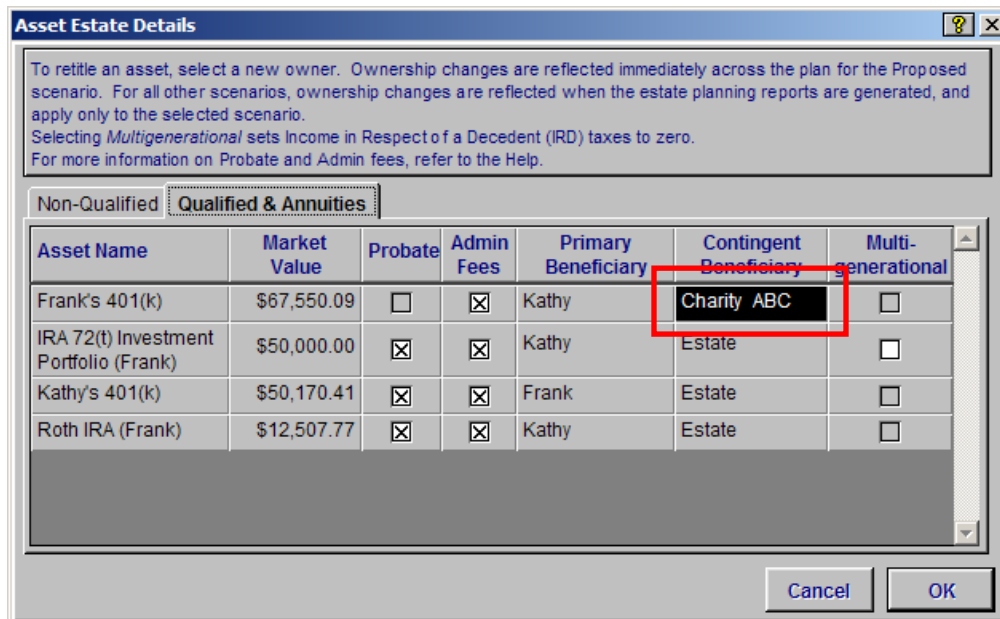


Figure 4

Once this scenario is recommended, the qualified plan will be gifted to the selected charity only upon the death of the primary beneficiary.

6. Click **OK** to return to the estate planning scenario flowchart.
7. To implement this estate planning scenario into the financial plan, click **Recommend** (Figure 5).

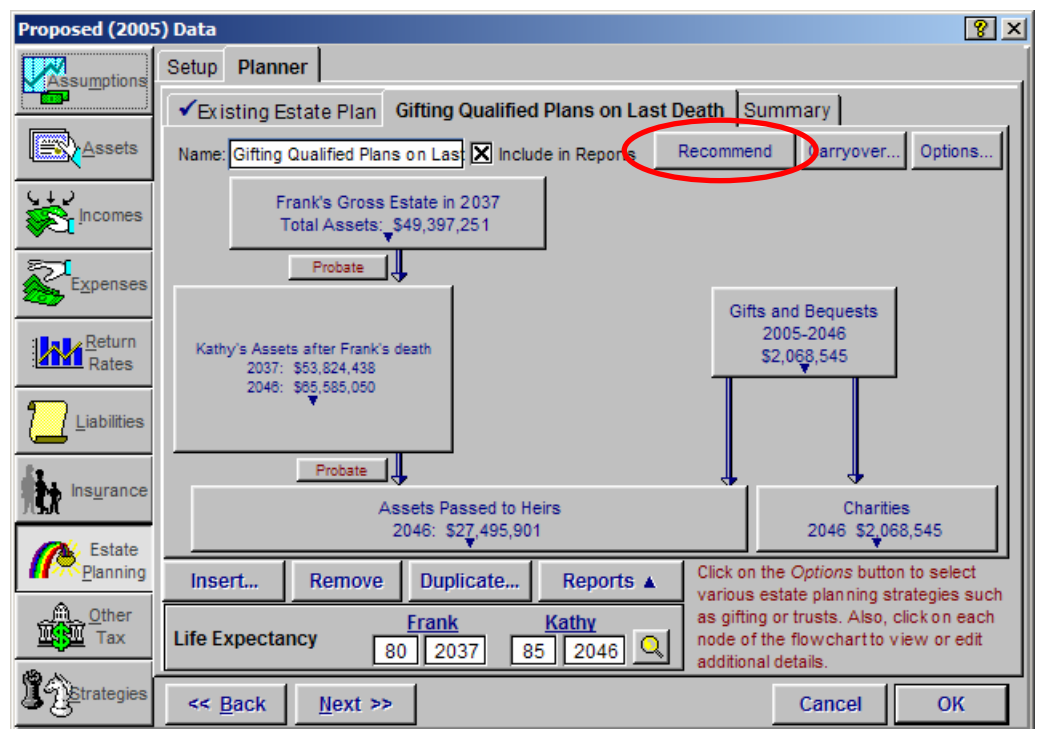


Figure 5

There is now a blue check mark beside this scenario's tab, confirming that this estate planning scenario is now implemented into the financial plan (Figure 6).

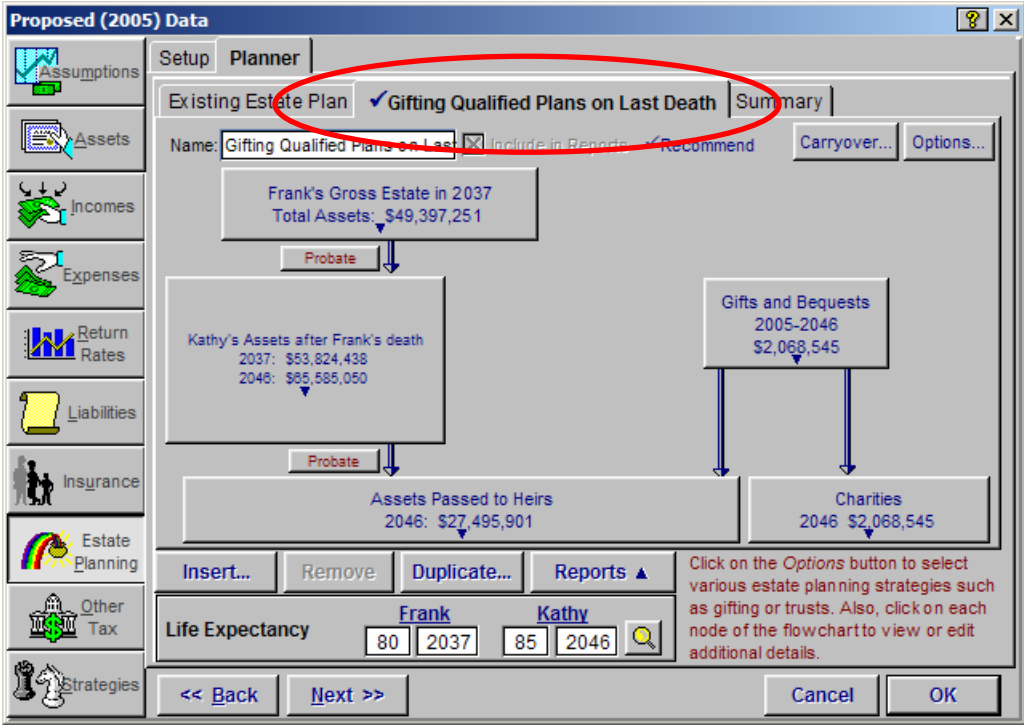


Figure 6