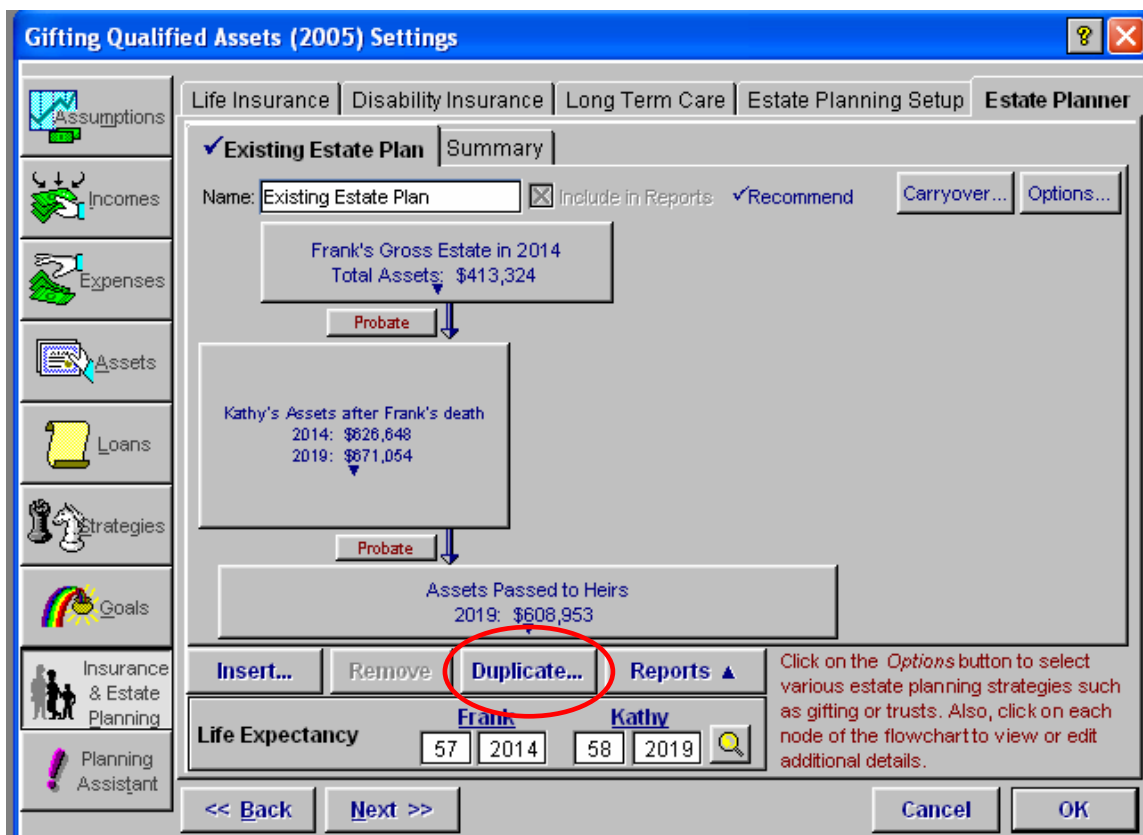


Gifting qualified plans to charity at last spouse's death

To gift qualified plans to charity at the last spouse's death:

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



The *Estate Planning Scenario Setup* dialog box opens.

2. Name the scenario, and then under *Estate Planning Tools*, select the **Gifting** check box.

Estate Planning Scenario Setup

General

Name: Gifting Qualified Plans at Last Death

Description:

Estate Planning Tools

Will Exists Other Marital Trusts (QTIPs, Marital Trusts)

Gifting Irrevocable Trusts (ILITs)

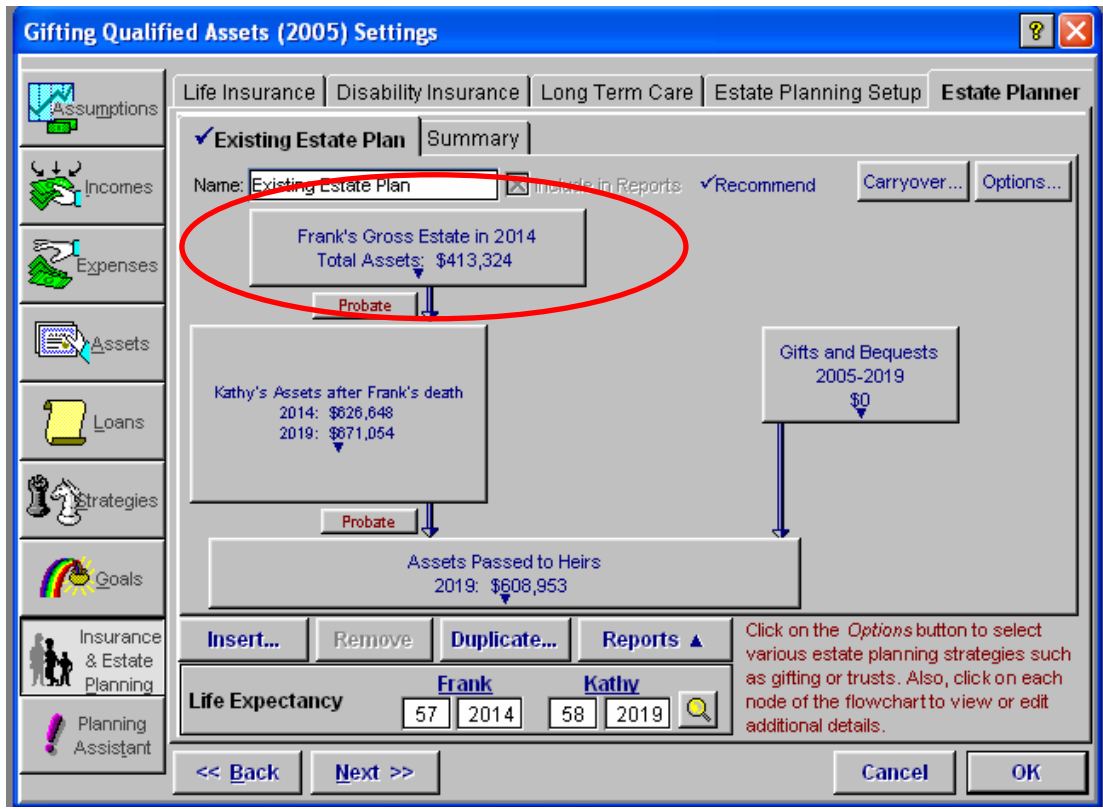
Credit Shelter Trust Living Trust

Testamentary Trusts (Generic Testamentary Trusts)

For more information about each of these estate planning tools, consult the online help.

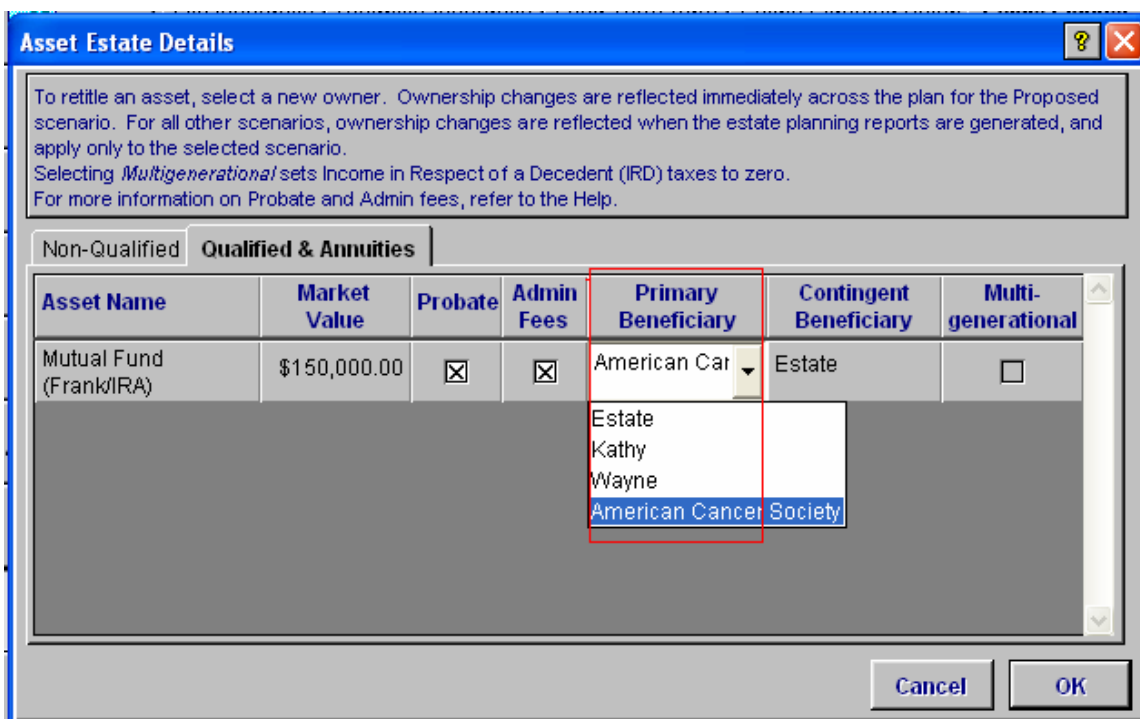
Cancel OK

3. Click **OK** to return to this scenario's flowchart.
4. Click the top node in the flowchart, and then select **Edit Asset Estate Details** From the list that appears.



The *Asset Estate Details* dialog box opens.

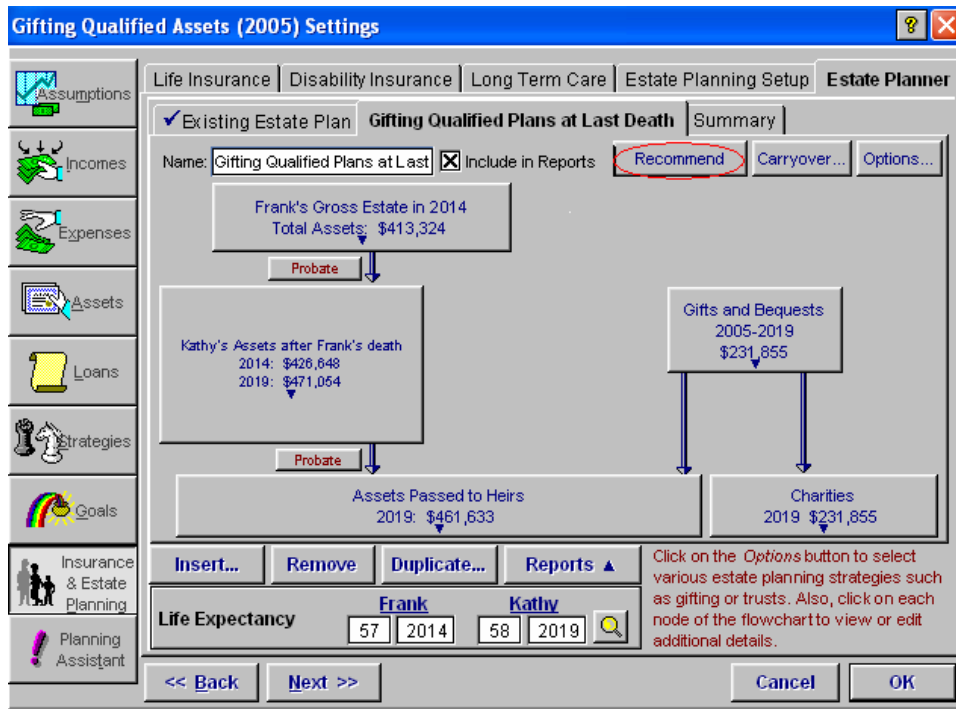
5. Go to the **Qualified & Annuities** tab.
6. Click the **Primary Beneficiary** cell, and then select the intended charity.



Once this scenario is recommended, the qualified plan will be gifted to the selected charity only upon the death of the last spouse, as defined under the clients' *Life Expectancy* fields in the *Assumptions* category – *Milestones* tab.

7. Click **OK** to return to the *Estate Planning Scenario* flowchart.

- To implement this estate planning scenario into the financial plan, click **Recommend**.



Clicking *Recommend* moves the blue check mark to this scenario's tab, confirming that this estate planning scenario is now implemented in the financial plan.

