

# HINKLE, HOLCOMB & YOU.

## **Let's Make a Plan This Year**

The New Year brings a time to reflect, plan, and start the tasks we meant to do last year, but never quite found the time. For some of us, the New Year to-do list includes planning for the future; whether that be for retirement, our health, or for our family's needs. While finances and future plans are on many resolution lists, sometimes the hardest part is taking that next step. Here are some ideas you might think about to help move your planning forward.

- What has changed in your life -- marital status, children or grandchildren that have been born or loved ones have passed, health condition has changed?
- Does your will arrange for the care of any minor children or pets? Does it provide for any special needs your loved ones may have? Does it minimize taxes and name a capable executor to oversee your affairs?
- Do you have a health care proxy? Have you given directions to be followed in case you become incapacitated and can't make decisions for yourself?
- How much of your savings will you need? When will you need it? Will your income maintain the lifestyle you envision?
- How will you support the people and causes important to you? Have you considered the right plan to make your goals a reality?

When you create or review your plans you have an opportunity to consider gifts to the community as well as your family and friends. Take a moment to think of Butler

University and other organizations that have been important to you during your life, and what kind of legacy you would like to leave.

If getting your finances in order or retirement planning is on your to-do list this year, we can provide you with creative gift strategies on how to approach financial planning for your future, your loved ones, and Butler.