

ESTATE PLANNING



DONALDSON
CAPITAL MANAGEMENT

PROTECTING WHAT MATTERS MOST

Every estate is unique, and so is every estate plan. We believe a plan that should reflect your values, guard your legacy, and ease the burden on your loved ones. Through a collaborative and personalized process, we help you:

- Review your current estate documents to create a clear, easy-to-understand summary.
- Explore charitable giving strategies that may increase the impact of your gifts and potentially reduce estate taxes.
- Evaluate trust options to identify techniques that support your goals.

Interested in seeing how this comes together?

Ask your advisor for a sample report.



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