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Is something holding you back?

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There are ways to combine charitable giving with retirement readiness

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What holds you back from being as generous as you'd like to be?

Many say their main priority is having enough money to handle their current and future financial needs – including providing for their spouse.

And we understand that concern. Successfully navigating retirement and potential long-term care needs is a very real concern for many!

At Everence®, however, we believe retirement planning can be about providing adequately for your needs and the needs of your loved ones –while also building a strategy that allows you to support the people and causes important to you.

As an example, an Everence Foundation donor advised fund was a sensible approach for a couple I've been consulting with recently.

The fund allows them to put money away now for future giving while they're working, and then be able to continue supporting favorite charities without adversely affecting their retirement preparations once they're no longer working.

Potential tax and estate planning benefits also made the donor advised fund an attractive option.

This is just one simple example of how financial planning can empower giving generously and wisely preparing for retirement.

Your Everence financial professional has a variety of tools such as charitable gift annuities and charitable trusts that, in addition to donor advised funds, can help you chart your course for retirement while remaining generous.

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