

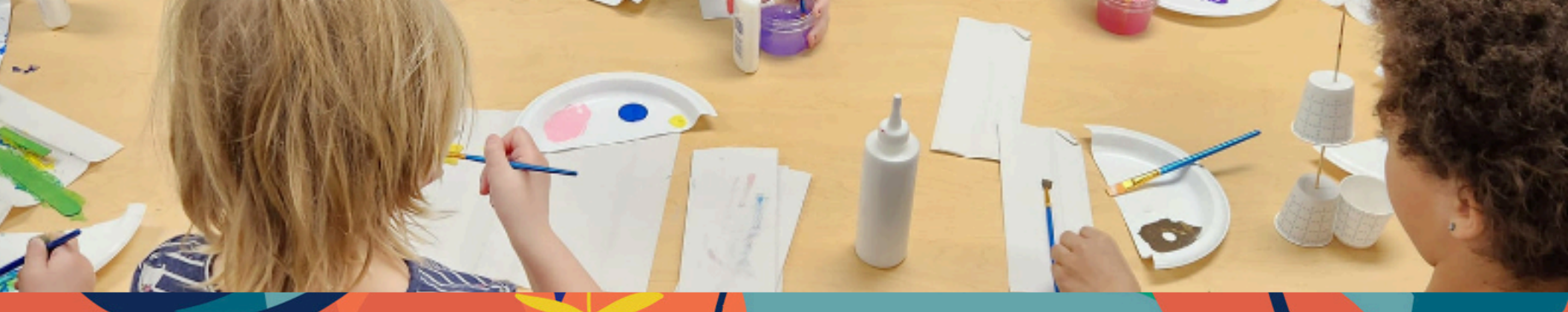
Estate Planning & Planned Giving Professional Resources

As you seek to complete your estate plan, Tanager offers the following recommended resources to assist you.

Law Firms/Attorneys with Expertise in Estate Planning/Trusts/Guardianship

Firm	Experts	Specialties	Location	Phone	Website
Shuttleworth & Ingersoll, P.L.C.	*Gary Streit, Sarah Barr, Don Johnson	Estate Planning, Trusts, Special Needs Trusts	235 6th Street SE Cedar Rapids, IA 52401	319-365-9461	www.shuttleworthlaw.com
Nazette, Marner, Nathanson & Shea LLP	*Randy Nazette, Ann Klostermann McCrea	Estate Planning, Trusts, Guardianship & Conservatorship	615 Second Street SW Cedar Rapids IA 52404-5798	319-366-1000	www.nazettelaw.com
Premier Trust & Estate, PLC	Casey Mushrush	Estate Planning, Trusts	3600 1st Ave. NE, Ste 100 Cedar Rapids IA 52402	319-363-3811	www.premieriwm.com
Simmons Perrine PLC	Kyle Wilcox, Paul Morf	Estate Planning, Trusts, Philanthropy	115 Third St. SE, Ste 1200 Cedar Rapids IA 52401	319-366-7641	www.spmblaw.com
Klinger, Robinson & Ford, LLC	Jeff Taylor	Estate Planning, Trusts	401 Old Marion RD NE Cedar Rapids IA 52402	319-512-7001	www.krflawfirm.com
Bradley & Riley PC	Janice Kerkove, Jessica Doro, Andrew Seyfer	Estate Planning, Trusts	2007 First Avenue SE Cedar Rapids IA 52402	319-363-0101	www.bradleyriley.com
Heartland Fiduciary Services	Erin Droll	Guardianship & Conservatorship	PO Box 5787 Coralville, IA 52241	319-321-6003	erin@heartlandfid.com

*Current or past board member



Estate Planning & Planned Giving Professional Resources cont'd

Financial Advisors with Expertise in Planned Giving

Firm	Experts	Location	Phone	Website
Bancks Halyard Group, Morgan Stanley	Jon Bancks	600 3rd Avenue SE, Ste 100 Cedar Rapids IA 52401	319-743-6060	fa.morganstanley.com/banckshalyard
Strategic Financial Solutions	Larry Witzel	222 3rd Ave SE, Suite 280 Cedar Rapids, IA 52401	319-363-2509	www.retiresfs.com
Strellner Financial Group	Tom Fox	4840 North River Boulevard NE Ste 100 Cedar Rapids, IA 5241	319-393-6526	www.sfg-cfg.com
CLA	*Kevin Welu	600 3rd Ave SE, Suite 300 Cedar Rapids, IA 52401-1619	319-558-0270	www.claconnect.com.com
Private Wealth Asset Management	*Christine Casey		319-308-6603	www.privatewealth.com
Premier Investments & Wealth Management	Roger Abel	3600 1st Avenue NE, Ste 100 Cedar Rapids IA 52402	319-363-3811	www.premieriwm.com
Carson Wealth	Justin Schultes	835 3rd Ave SE Cedar Rapids, IA 52403	319-200-8700	www.carsonwealth.com



Estate Planning & Planned Giving Professional Resources cont'd

Trust Officers with Expertise in Planned Giving

Bank	Experts	Location	Phone	Website
Cedar Rapids Bank & Trust	Kevin Bruns	500 1St Avenue NE Cedar Rapids IA 52401	319-743-7151	www.crbt.bank
Farmers State Bank	*Chad Fesler	1240 8th Ave Marion, IA 52302	319-730-7017	www.myfsbonline.com
Hills Bank Wealth Management	*Will Schwickerath	1240 8th Ave Marion, IA 52302	319-665-5748	www.hillsbank.com
BankIowa	Will Hillshiem	2701 Edgewood Pkwy SW Cedar Rapids, IA 52405	319-249-7082	www.bankiowa.com

This information is not intended as legal or tax advice. Please contact your financial advisor or estate planning attorney to discuss which option is right for you.

Please visit www.tanagerplace.org/donate for more information on all ways to give, or contact the Tanager Philanthropy team at: (319) 365-9164 or philanthropy@tanagerplace.org.



Online Will Services

Working with an attorney is always recommended in order to ensure all aspects of your will and intentions have been taken into consideration and properly documented. However, we realize that legal fees and other barriers may inhibit some individuals from completing their will. The following options and considerations often reduce costs:

- Complete an Estate Planning Guide prior to working with an attorney, in order to ensure all information is compiled and ready
- Request a more Junior attorney from a firm - estate planning will still be well within their scope, while offering lower hourly rates
- Simple wills with one marriage/family/beneficiary are typically the lowest cost

While these options can significantly reduce costs for most families, the following alternative programs are offered for those who might not otherwise be able to complete a will. It is important to note that these **wills will not become legal without further steps, including being signed by two witnesses and notarized.**

Free Will: [FreeWill.com](https://www.freewill.com) provides several resources for those wanting simple and no-cost planning services. Individuals can set up an account to store all of their information in one place. FreeWill also provides the option to designate gifts to charities such as Tanager through wills, beneficiary designations, and more - directly from their platform.

Will Maker: To develop a Last Will & Testament, utilize the free, interactive [online WillMaker](#). Enter your information and create a last will and testament, customized to your wishes.

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Estate Planning: Forms to Complete

Living Will: Use an advance healthcare directive, or living will, to specify your healthcare wishes and appoint someone to make decisions on your behalf if you are unable. Tanager recommends the [American Bar Association Toolkit for Health Care Advanced Planning](#) for more information.

Durable Financial Power of Attorney (DFPOA) – Keep your financial accounts accessible and bills paid by appointment someone to make financial decisions on your behalf if you are unable. For further information, please visit the [Iowa State Bar Association](#) website.

Iowa Physician Orders for Scope of Treatment (IPOST): A document that allows a person to communicate their preferences for key life-sustaining treatments including: resuscitation, general scope of treatment, artificial nutrition and more. IPOST is appropriate for an individual who is a frail elderly, or who has a chronic, critical medical condition or terminal illness. [Visit their website](#) for more information.

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