

Heritage Circle

A financial and charitable planning guide from Marist School

A Legacy of Support for Future Generations

Marist School has played an important role in the life of the Wynne family, not only for the brothers who attended Marist—Dr. Conrad V. “Val” Wynne, Jr. ‘71 (deceased); Christopher J. “Chris” Wynne ‘74; and James R. “J.R.” Wynne ‘80—but also for their sister Jeanne Wynne Harrison and their parents. Catholic education was a top priority for their parents, and the family made the 30-minute drive from Marietta every day to give their sons a Marist education (when Jeanne entered middle school, Marist was not yet co-educational).

For nearly five decades, the family has enjoyed a special friendship with longtime Marist English teacher Fr. Ralph Olek, S.M. From Christmas celebrations to family weddings, to sicknesses, and to the deaths of loved ones, Fr. Olek has always been there, serving as a close friend and spiritual leader for the Wynnes, who consider him one of their own.

Demonstrating their deep commitment to Marist School, the Wynne family has established an endowed fund through an estate gift designated to Marist by Val and his beloved late wife, Dr. Regina Suzanne Bland, which also will include future contributions from Chris, J.R., Jeanne, and their families. The fund, created in appreciation of the great work of Fr. Olek, will provide tuition assistance to Marist students with demonstrated financial need. Fr. Olek described how humbled he was when



The Wynne siblings with their mother.

he learned of this gift from the Wynnes. He says, “I was very flattered and grateful that they could do something like this to help current and future students.”

As a result of the thoughtful philanthropy led by Val and Regina’s gift, the Wynnes are creating a legacy of support and providing opportunities for generations of Marist students to benefit from the distinctive Marist educational experience.

The Heritage Circle, Marist School’s planned giving society, provides opportunities for Marist families and friends to remember Marist in their estate plans and provide for Marist now and into the future.

Make Things Easier on Yourself by Planning Ahead

Can't predict what's next? It's tempting to put planning on hold. Unfortunately, loose ends can lead to future stress and rash decisions.

Consider this: Planning under "normal" circumstances allows you to slow down and review your options. For example, taking the time to be mindful when creating an estate plan gives you the opportunity to record your values and make sure your wishes are followed. A thoughtful estate plan can also tell your story through the causes you support after your lifetime.

A well-planned estate helps you:

- **Make the most of your assets.** Meeting with qualified professionals helps you grow your wealth over the long term.
- **Protect family and loved ones.** An up-to-date estate plan keeps loved ones safe. Reviewing it regularly means adjusting for changes in personal relationships, tax laws, births, deaths, and state of residence.
- **Be tax smart.** Certain assets can be tax burdens (or at least tax surprises) to your family. Planning helps you keep them in the loop and possibly avoid a tax hit altogether.
- **Continue helping others after your lifetime.** Gifts to Marist School may provide you financial benefits in addition to the fulfillment that comes from helping others.

Save It or Shred It?

When can you safely discard these important documents?

Bank deposit slips	After you reconcile your statements
Banking statements	After a calendar year; store with tax returns if any will be used to prove deductions
Employer defined-benefit plan communications	Never
Investment statements (brokerage, 401(k), IRA, Keogh)	Shred old monthly and quarterly statements when you receive a new one; save annual statements until you sell the investments
Investment purchase confirmations and 1099s	Hold until you sell the securities, then keep with your tax records for an additional seven years
Life insurance policies	Never, if still in force; store in your safe-deposit box
Safe-deposit box inventory	Never, but review and update each year
Social Security statements	Shred an old statement when you receive a new one
Tax returns and related documents	After seven years



Easily Overlooked Items in Your Estate Plan

If you're taking another look at your existing estate plan, or just starting your planning journey, be sure to include the following items—in addition to a will—to make things easier for you and your loved ones. In most cases, you won't need to involve an attorney.

Be Sure You Have:

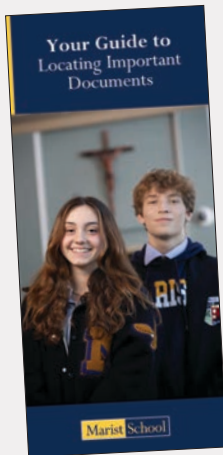
- 1. A high-level overview** that lays out the basics of your finances and plans. Include:
 - Where to find your will and other documents, and who the key people are—your agents under the powers of attorney and executors or personal representatives
 - Financial assets (where accounts are held and who owns them)
 - Insurance coverage (property/casualty, health, life)
 - Property and vehicle information
 - Regular household bills that you pay
- 2. A detailed description of your finances** (account numbers, contacts at financial institutions, etc.).
- 3. A personal property memorandum** that is referenced by your will and states how you want property distributed and/or sold. This allows you to assign sentimental or valuable assets to specific people without having to change your will if you change your mind.
- 4. A plan for your pets** to ensure that your furry friends are taken care of. A legally binding pet trust can be created,

or you can make provisions in your will for how you want your pets cared for in your absence.

- 5. Your digital estate plan**, which includes online account details.
- 6. Advance directives, powers of attorney, and other end-of-life planning tools** to communicate your basic wishes. Add personal messages and detailed plans for your funeral, memorial, and other specifics.
- 7. An ethical will**, which is your opportunity to hand down your values in a document or video. Think of it as a personal record of your life—how you've lived it and how you want to inspire others.

Explore Your Legacy at Marist School

Wherever you are in the process, your estate plan is a powerful way to show your love for your favorite causes, such as ours. Please contact the Marist Office for Institutional Advancement at (770) 936-6424 or giving@marist.com to learn more about including us in your future plans.



Organize Your Important Papers

Do your loved ones know where you keep your important papers? Send for ***Your Guide to Locating Important Documents***, a FREE guide to help you list all the vital information they may need, giving them—and you—peace of mind. Return the reply card today to get yours.

Marist School

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What Do You Value Most?

Taking time to think about and document what's important—and why it's important—can help you connect more deeply with the people and places you hold dear. You should consider writing an ethical will.

While the name “ethical will” may be new to you, the concept may not be. Think of an ethical will (a.k.a. a generosity journal or legacy letter) as a vital part of your estate plan.

The record of the experiences you have had, lessons you have learned, and the causes you have chosen to support throughout your life is a meaningful way to tell your story, pass on your values, and give yourself peace of mind that part of you will live on.

