

VALUES-BASED ESTATE PLANNING

As a benefit to Saint Louis Zoo friends, the Planned Giving program offers confidential, comprehensive estate planning at no charge and with no obligation.

HOW THE PROCESS WORKS

Introductory Meeting — an introductory meeting with our consultant is arranged. If you choose to continue the planning process following your initial meeting, you may meet with our consultant 3 to 6 times to complete the process via monthly visits.

Your Estate Planning Goals and Objectives —

After completing a simple questionnaire, our consultant will work with you to help clarify your estate planning goals. Goals may include financial needs for you, your spouse/partner and heirs, including special needs situations. Planning also includes making tax-wise decisions in achieving any personal legacy and charitable goals you may have.

Personal Philosophy Statement — From the information gathered, a Personal Financial Philosophy statement is developed that confirms and restates your values and objectives.

Estate Asset Review — A Net Worth Statement will be created to aid in developing your comprehensive estate plan. All information is kept in confidence.

Plan Development and Review — Using the Personal Financial Philosophy statement, you will be presented with estate planning options that meet your personal objectives. If you desire, our consultant will meet with you and your professional advisor(s) to discuss the recommendations.

Plan Implementation — Now equipped with a framework, you are ready to work with your advisor(s) to implement your personalized values-based estate plan, and enjoy peace of mind that your wishes will be honored and your loved ones provided for.

Our consultant does not draft legal documents, manage money, sell any products or ask you to make a gift. All information you provide is kept in confidence.

For more information or to schedule an introductory meeting with our consultant, please call Robin or Lori on our planned giving team at (314) 646-4973 or email plannedgiving@stlzoo.org.