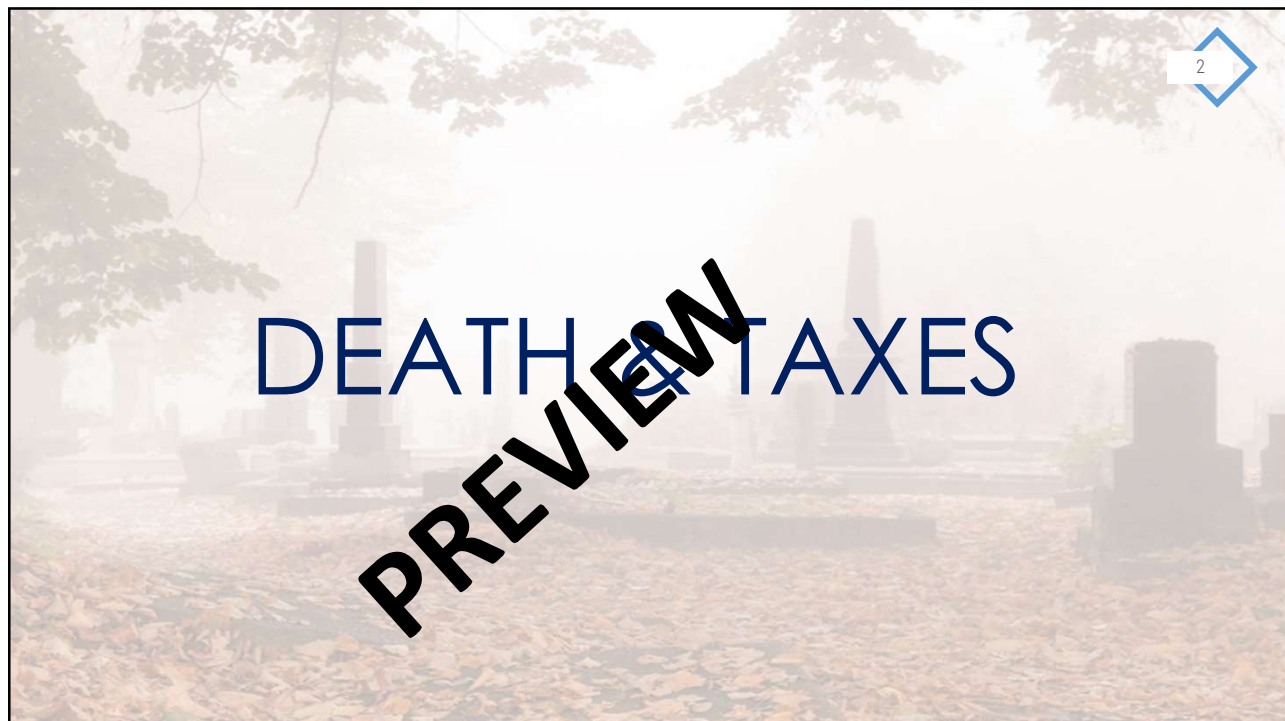




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## “Happy Money”



Dunn & Norton, *Happy Money: The Science of Smarter Spending*, 2013

5

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## 1. Buy Experiences



Dunn & Norton, *Happy Money: The Science of Smarter Spending*, 2013

6

7

### 3. Buy Time



Dunn & Norton, *Happy Money: The Science of Smarter Spending*, 2013

7

8

### QUESTION...

What % of American adults do not have a Will or other estate plan in place . . . ?

55%

Source: <https://info.legalzoom.com/statistics-last-wills-testaments-3947.html>

8

QUESTIONS  
TO ASK  
YOURSELF:



PREVIEW

9

9

“Do you know  
what your  
estate will  
contain and  
how much it  
will be worth?”



PREVIEW

1

10

10

11

future value of your estate?

- home?
- cottage?
- rental properties?
- business?
- IRAs, Roth IRAs, 401(k)s?
- investment portfolio?
- insurance proceeds?



**PREVIEW**

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“Do you know exactly what would happen to your family if you didn’t wake-up tomorrow?”

I told you I was sick  
 Maybe next time you  
 will believe me

**PREVIEW**

**3**

12



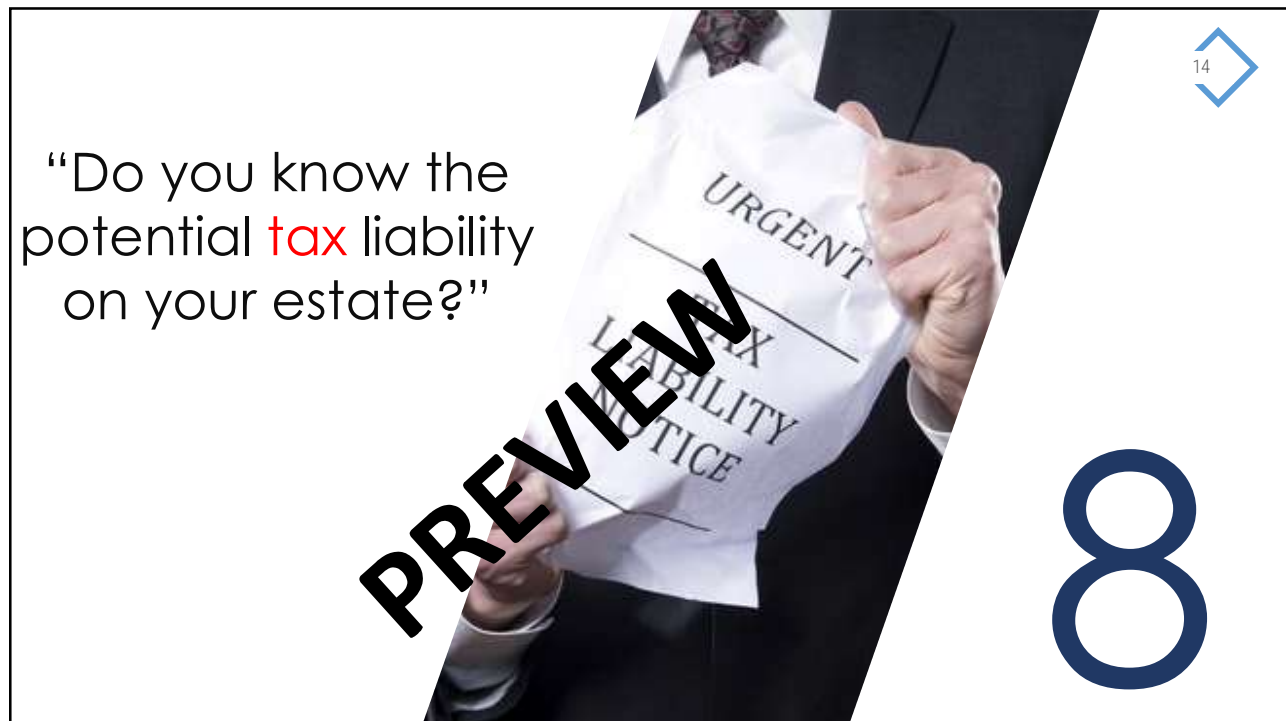
“Are you, or part of your family, a ‘blended-family’?”

PREVIEW

5

13

13



“Do you know the potential **tax** liability on your estate?”

PREVIEW

URGENT  
TAX  
LIABILITY  
NOTICE

8

14

14

estate taxes & fees?

- federal estate tax
- state estate tax
- gift tax
- state inheritance tax
- state gift tax
- generation skipping tax
- probate fees



PREVIEW

YOUR BENEFICIARIES INCLUDE:



IRS Taxes  
(what's due)



Your Creditors  
(what's owed)



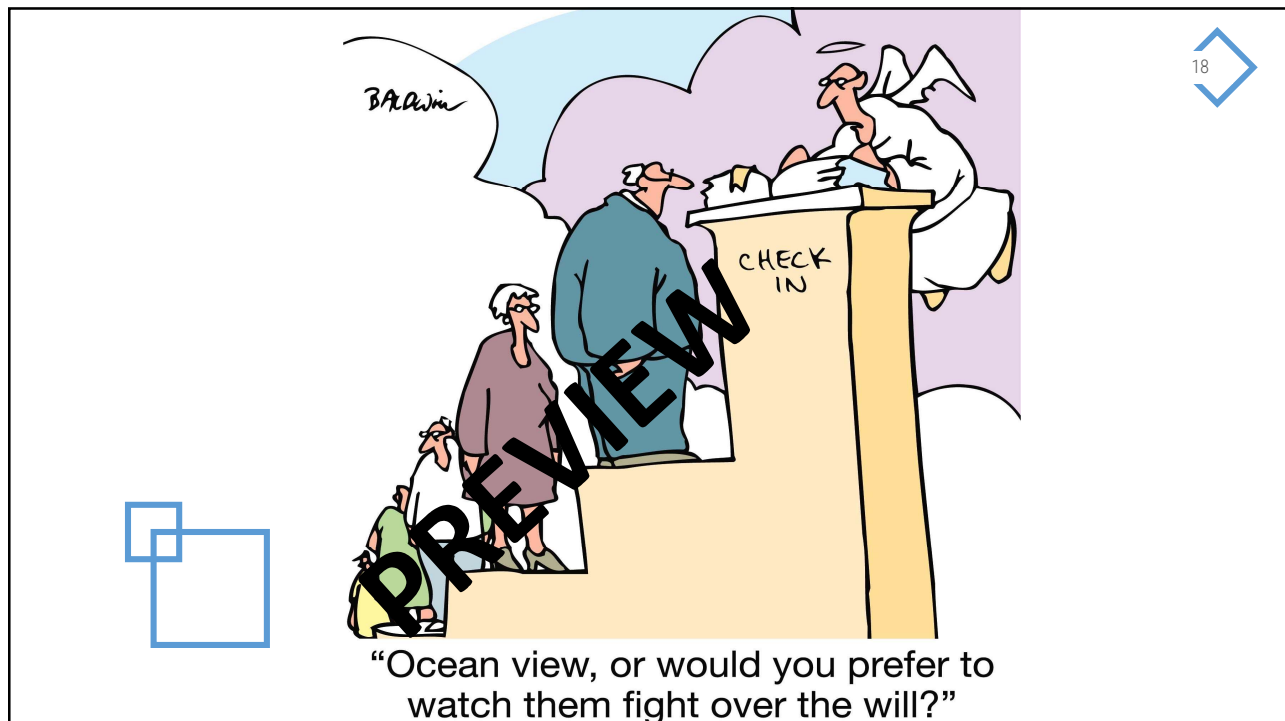
Your Estate  
(what's left for your heirs)

PREVIEW





17



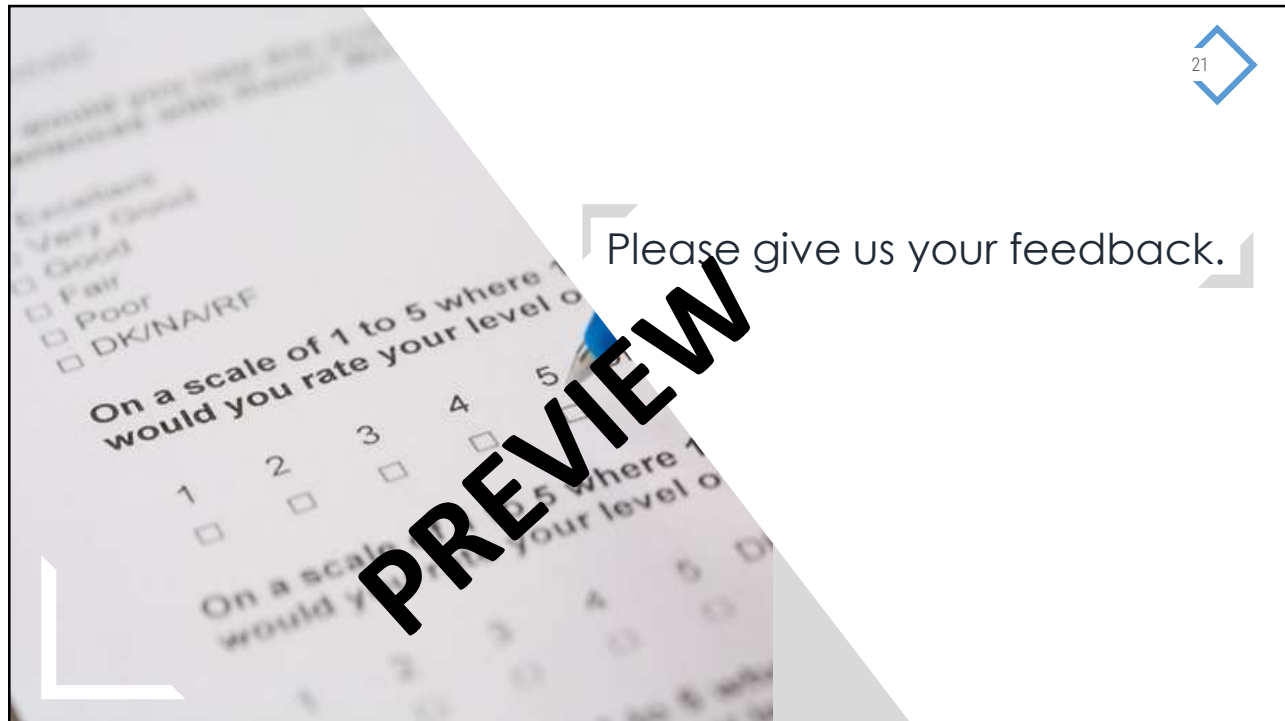
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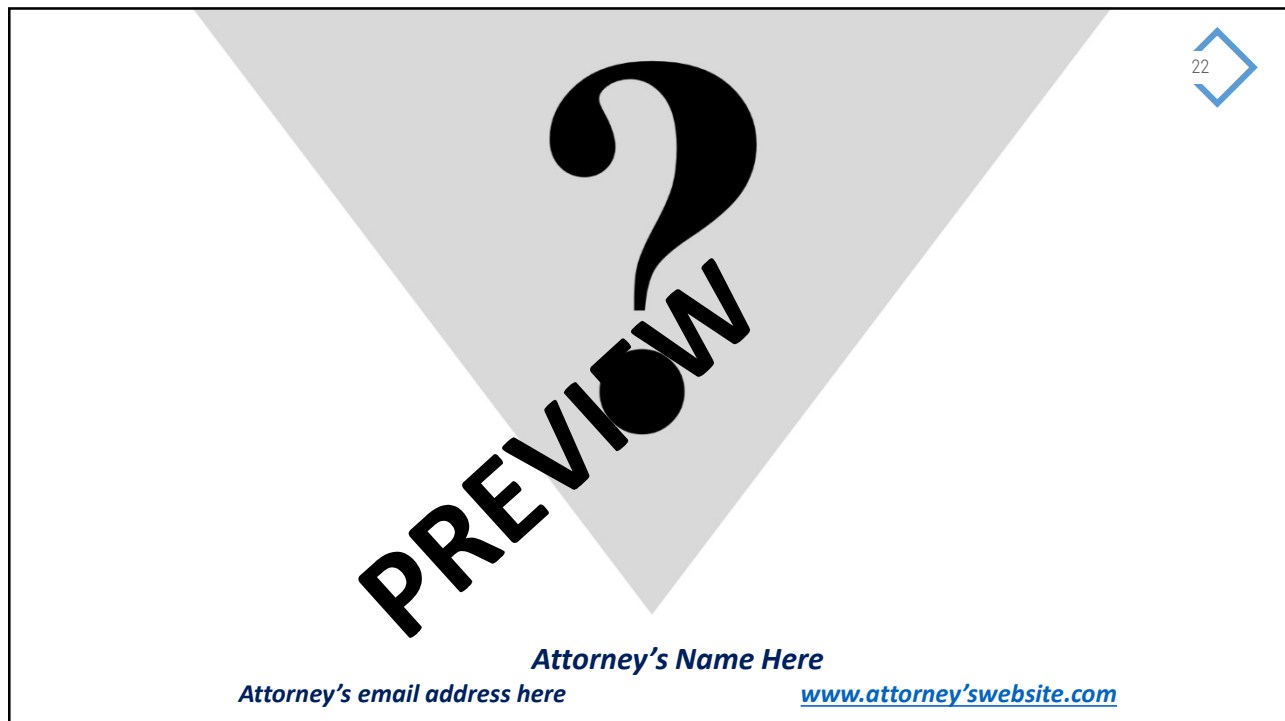


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Please give us your feedback.

**PREVIEW**

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**PREVIEW**

*Attorney's Name Here*

*Attorney's email address here*

[www.attorney'swebsite.com](http://www.attorney'swebsite.com)

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