



MedStar Health

## Values-based **estate planning.**

**A special free and confidential opportunity provided by MedStar Health**

**Gratitude matters.**

Values-based estate planning is a personalized process. You work with a consultant to develop your estate plan or answer questions you may have related to your plan.

Take advantage of this opportunity for values-based estate planning with Jeremy Pharr of Thompson & Associates, a firm that works exclusively with nonprofit organizations like MedStar Health.

The service is provided at no cost to friends of MedStar Health. All information shared will be held in the strictest confidence and will not be disclosed to MedStar Health or any other source. Thompson & Associates does not draft documents, manage money, sell services or products, or ask you to make a gift.

Thompson & Associates provides unbiased counsel in connecting your lifetime values with your asset strategies. Attorney Jeremy Pharr has assisted with the planning of hundreds of estates across the country.



**Jeremy Pharr, JD**

**Thompson & Associates**  
*Values-Based Estate Planning*

### **Your estate plan:**

- is a living document that represents all that you value
- it provides you with the opportunity to ensure that your values continue to impact society and those you love
- may need to be evaluated from time to time to ensure it is an accurate reflection of your intentions

**Is your estate plan complete and up to date? Could you benefit from a conversation with Jeremy Pharr of Thompson & Associates? Here is how the process works:**

- Jeremy comes to MedStar Health once a month and meets with our friends and supporters to develop or complete an estate plan.
- Meetings take place in a private meeting room at the hospital or at a place of convenience to you, including your home or office.
- Jeremy's job is to answer your questions and/or help you to create your estate plan.
- Remember Jeremy does not draft documents, manage money, sell services or products, or ask you to make a gift.
- Many people who believed that they had the best estate plans in place learned how they could better align their values with their plans and how to create tax savings!

**Did you know?**

**What you might wish your estate plan would do:**

**The reality for most people:**

**100%**  
**to your heirs**

**70%**  
**to your heirs**

**0%**  
**paid in taxes**

**30%**  
**to taxes**

**Third bucket**

- Take care of your heirs
- Reduce, eliminate, or redirect your taxes, and
- Support those organizations you value the most, like MedStar Health

**Gratitude matters to you and to us.** To schedule your free and confidential conversation with Jeremy Pharr, JD, contact the MedStar Health philanthropy team at **410-772-6747** or email **philanthropy@medstar.net**.