



## The UTBF 2018 Holiday Gift and Experience Guide

Some gifts (and exclusive experiences) are more exciting and fun than others. And while estate planning may not be on the top of every family member's gift list it can be one of the nicest and most powerful gifts that you can ever give. We've also included some ways to make shopping for personal and great gifts easier and less hectic for you!

Here are resources for the digital gift and experience guide. For easy shopping (often from home) just read below, or go to <http://bit.ly/UTBFHolidayGift> and read the descriptions and click the links to buy.

Some gifts (and experiences) are more exciting than others. And while estate planning may not be on the top of every family member's gift list it can be one of the nicest and most powerful gifts that you give.

We've scoured the stores and the internet to assemble and to bring to you a Holiday Gift Guide of both fun gift ideas as well as our own offering of estate planning gifts and some one of a kind experiences that Dave and Doug have created for you.

And, if you've already done your own estate planning and really want to protect your children, and especially grandchildren, this holiday season, then you know it's finally time to get the adult kids to do or to update wills, trusts and all of the essential planning documents for themselves.

So have fun and enjoy gifting and the entire holiday season and experience.

### **Have an aspiring chef or really keen do it yourselfer/foodie and you're running out of ideas? Think CHEESE!**

Yes, for under \$30.00 you can get that child or grandchild this amazing kit to make ricotta or mozzarella cheeses at home. Here is a link: <http://bit.ly/UTBF4> or you can go directly to our online gift guide and click the links there.

### **More interested in an exclusive foodie experience? Think exclusive experience!**

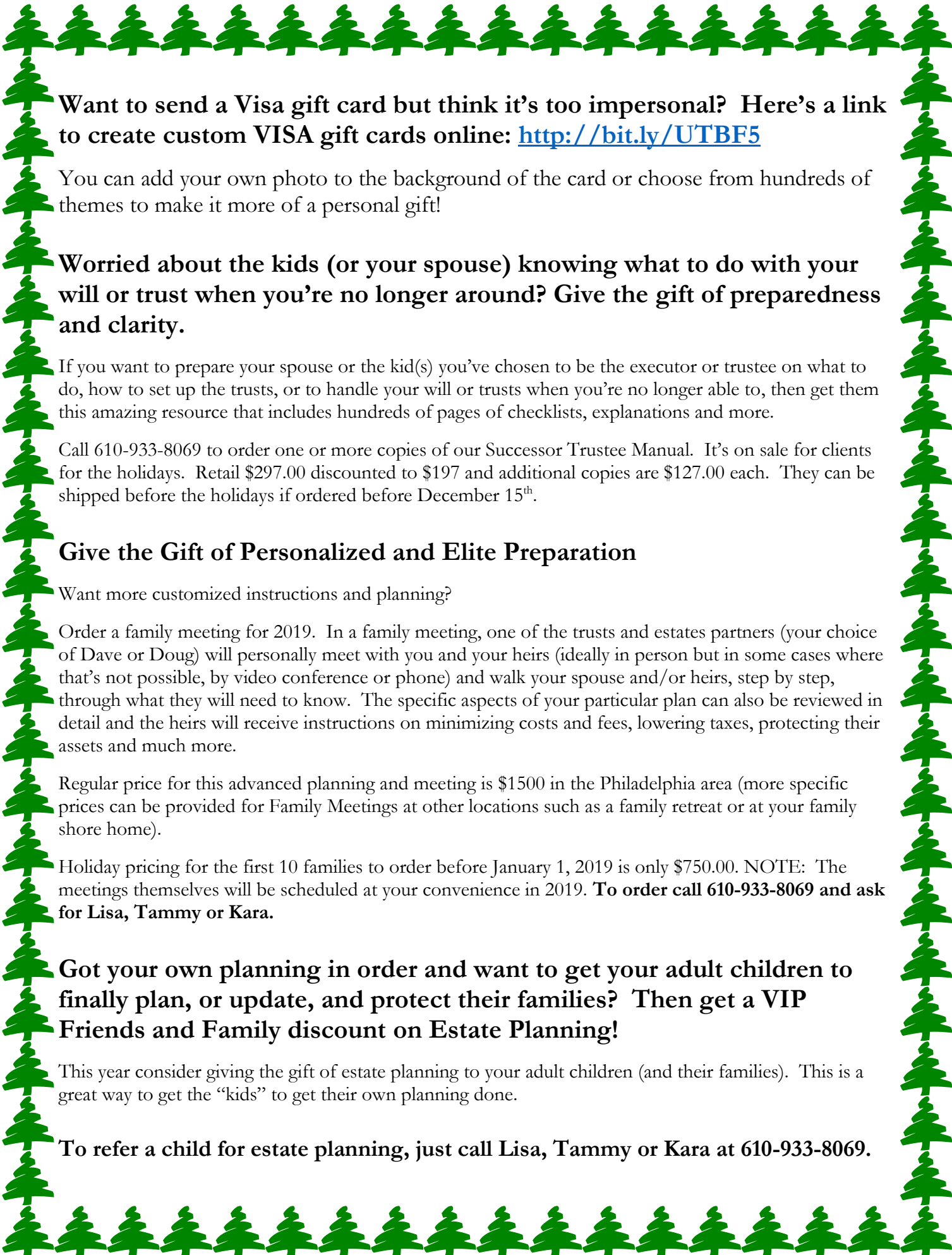
Dave Frees is sponsoring an outstanding event at the Eastern Shore Food Lab located at Washington College in Chestertown, Maryland. If you have a foodie or budding chef/restaurateur then call to get on the list to go with Dave for a personal lesson from Professor Bill Schindler – food archeologist and star of National Geographic's series, The Great Human Race, as Bill take our group through foraging for foods, fermentation, cheese making and more. NOTE: Bill has also created an amazing brick fired pizza oven and here will be pizza!

Call Lisa at (610) 933-8069 to get on the list to go to one of these events.

### **Got an avid reader or know that you want to give an Amazon gift card but don't want to stand in line for hours at the bookstore?**

Here's a link to pick and print Amazon gift cards right at home: <http://bit.ly/UTBFidea>.

It doesn't get any easier than that.



**Want to send a Visa gift card but think it's too impersonal? Here's a link to create custom VISA gift cards online: <http://bit.ly/UTBF5>**

You can add your own photo to the background of the card or choose from hundreds of themes to make it more of a personal gift!

**Worried about the kids (or your spouse) knowing what to do with your will or trust when you're no longer around? Give the gift of preparedness and clarity.**

If you want to prepare your spouse or the kid(s) you've chosen to be the executor or trustee on what to do, how to set up the trusts, or to handle your will or trusts when you're no longer able to, then get them this amazing resource that includes hundreds of pages of checklists, explanations and more.

Call 610-933-8069 to order one or more copies of our Successor Trustee Manual. It's on sale for clients for the holidays. Retail \$297.00 discounted to \$197 and additional copies are \$127.00 each. They can be shipped before the holidays if ordered before December 15<sup>th</sup>.

### **Give the Gift of Personalized and Elite Preparation**

Want more customized instructions and planning?

Order a family meeting for 2019. In a family meeting, one of the trusts and estates partners (your choice of Dave or Doug) will personally meet with you and your heirs (ideally in person but in some cases where that's not possible, by video conference or phone) and walk your spouse and/or heirs, step by step, through what they will need to know. The specific aspects of your particular plan can also be reviewed in detail and the heirs will receive instructions on minimizing costs and fees, lowering taxes, protecting their assets and much more.

Regular price for this advanced planning and meeting is \$1500 in the Philadelphia area (more specific prices can be provided for Family Meetings at other locations such as a family retreat or at your family shore home).

Holiday pricing for the first 10 families to order before January 1, 2019 is only \$750.00. NOTE: The meetings themselves will be scheduled at your convenience in 2019. **To order call 610-933-8069 and ask for Lisa, Tammy or Kara.**

**Got your own planning in order and want to get your adult children to finally plan, or update, and protect their families? Then get a VIP Friends and Family discount on Estate Planning!**

This year consider giving the gift of estate planning to your adult children (and their families). This is a great way to get the "kids" to get their own planning done.

**To refer a child for estate planning, just call Lisa, Tammy or Kara at 610-933-8069.**