



# Regions Hospital® Foundation

HealthPartners®

You are invited to participate in an exclusive program at Regions Hospital Foundation, established to say "Thank You" to individuals, like you, whose life and reach has made a positive impact on others!

Our gift to you is a values-based estate planning service we offer on a complimentary basis, with no hidden agenda, no pressure, no obligation and no time restraint.

Thompson & Associates' unique approach to planning ensures your story is communicated with the same passion, values, and love that has defined and inspired you over your lifetime. For nearly two decades their team has been providing this special service to people throughout the United States. Some people use this consultation as a chance to get a "second opinion" on an existing plan, while others use it to update an older plan or to explore additional ways of reaching their estate planning goals.

## THE PROCESS:

- > Costs you nothing. They do not sell, nor offer to sell, any products or services.
- > Is completely confidential. Information you choose to share with Thompson & Associates is not disclosed to Regions Hospital Foundation.
- > Includes an introductory meeting with our Thompson & Associates' representative, Joe Thiels, J.D., to learn what the program entails.
- > During the course of future meetings, Joe will help you clarify your personal values and goals, and ensure your estate plan reflects these desires. The process produces recommendations that incorporate your values story along with strategies on how to provide for your loved ones and reduce tax burdens.
- > Once your plan is finalized, Joe will help you share the details with your own attorneys or other professionals to implement. Your advisors would draft the final documents and put your strategies in place.

## WHAT OTHERS HAVE SAID...

*"Both Jan and I found our values-based estate planning meetings with Joe Thiels extremely helpful. It is easy to put off serious consideration of estate planning until another day for a variety of reasons. However, our meetings with Joe helped us think in detail about and take positive steps towards developing our estate plans based on our values and desires. It was great to be able to do this at our leisure and without any pressure, along with someone like Joe who has so much experience with this process. In addition, Joe was very helpful in bringing to my attention certain issues with my current donation plans in regard to optimizing my tax filings which I so appreciated."*

**- Bill Frey, PhD and Jan Volkenant**



## FOR MORE INFORMATION

Please contact Chris Pulkrabek at 651.254.3736 or [Christine.M.Pulkrabek@HealthPartners.com](mailto:Christine.M.Pulkrabek@HealthPartners.com).