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TESTIMONIAL 1

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When my wife and I moved to Fort Mill in 1995, we thought we should update our wills, but just never got around to it. So when Unity introduced an endowment fund, it was enough to get us moving and we did the update, including a final bequest to Unity. I also named Unity as beneficiary to a small life insurance policy I've been carrying for many years.

While preparing for the will update, I realized that a large portion of our assets are in my retirement IRA which would pass directly to my beneficiary upon my death. An easy way to give a final gift to Unity would be to include it as a beneficiary, or secondary beneficiary, for the IRA. This can be done as a dollar amount or percentage without any need for a will.

Steve

“Creating A Legacy Today, For A Faithful Tomorrow”