

FRONT STREET
FOUNDATION

Money Series

Open-access to financial education, for all.

Front Street Foundation is a 501(c)(3) nonprofit organization
FrontStreetFoundation.org

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Money Series Video Replay | Estate Planning

January 27, 2017



Diane Kuhn Huff
Stephen & Anderson PLC

Watch Diane Kuhn Huff of Stephen & Anderson PLC present for the Front Street Foundation's Money Series on estate planning, maintaining choices as you age. Money Series Schedule

Money Series Video Replay | Year-End Tips

December 16, 2016



Gregory M. Luyt
Bowerman, Bowden, Ford, Clulo & Luyt, P.C.

Watch Greg Luyt of Bowerman, Bowden, Ford, Clulo & Luyt, P.C. along with Jason P. Tank, investment adviser, present for the Front Street Foundation's Money Series on year-end tips for financial planning & beyond. Money Series Schedule

Money Series Video Replay | Social Security: the Rules and Options

March 1, 2017



Jason P. Tank, CFA
Front Street Wealth Management

Watch Jason P. Tank present for the Front Street Foundation's Money Series on Social Security: the rules and options. Money Series Schedule

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Beneficiary Designations
Getting it Right

Building Blocks of an Estate Plan



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Your Inventory of Assets

Establishing Your Beneficiary



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Your Beneficiary Options

The Basic Choices



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*Spousal Beneficiary:
What's Mine is Yours!*



What's Mine is Yours

Simplicity

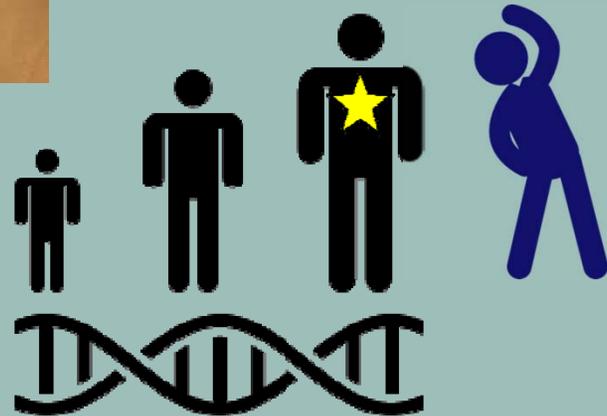


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Non-Spousal Beneficiaries: Benefits of a “Stretch IRA”



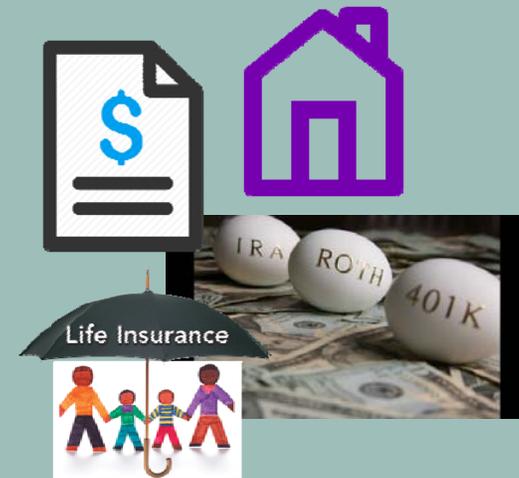
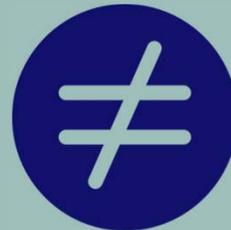
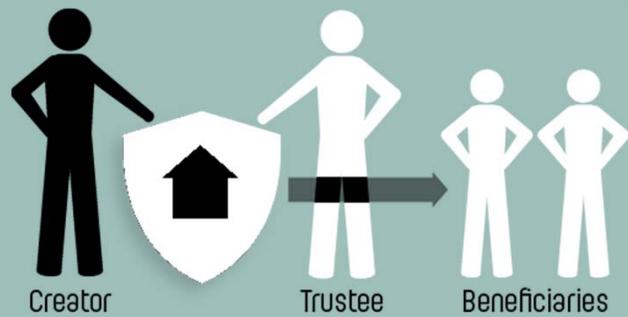
*Trust Beneficiaries:
“Look Through” for IRAs*



Charity Beneficiaries



Beware of Misalignment



The Importance of Maintenance



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TRAVERSE AREA
DISTRICT
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SENIOR CENTER
NETWORK
Grand Traverse County Parks & Recreation

UpNorthTV
Channel 189