

“It’s Not Just About The Money”

Quaker Values and Personal Financial Decisions

Quakers have a long tradition of building our lives around our values. It has never been enough to simply profess belief in an ethical or moral philosophy – beliefs should lead to action. That is why Friends have so often been at the forefront of positive social change.

This same practice should apply to how we handle our money. It is important to care for ourselves, our loved ones and our community financially, but how can we do that in ways that also support Quaker values?

A workshop to be hosted by **Kennett Friends Meeting** will address these questions and many others. Larry Jalowiec, Director of FGC Stewardship Services, and Matt Novak, a Chartered Financial Analyst with Everence, a \$2 billion Mennonite financial organization, will facilitate this program.

Date: Saturday, November 15, 2014

Time: 9 am – 12 pm

Topic: Financial and Estate Planning

Place: Kennett Friends Meeting, 125 West Sickle Street, Kennett Square, PA.

A will is a basic planning document that everyone should have, yet most Americans have no will or the will they have is outdated. Good estate planning is more than a will. It should include advance medical directives, powers of attorney, and other important documents that care for your loved ones, reflect your values, and support the causes you believe in.

This workshop will give you a good overview of the financial considerations involved in the planning process and how best to use various annuities, trusts and other vehicles to help reduce your tax exposure and maximize your gifts to family and charity. It can also help you to overcome the procrastination in getting it done. FGC and Everence offer complimentary Financial Evaluation and consultation as part of their financial and estate planning services for Quakers. FGC charges no fee for this workshop or accompanying materials. Over 350 Friends in 10 states have attended this seminar, and more than 70 have taken advantage of the financial consultation service offered to Friends. Their evaluations have been overwhelmingly supportive.

Please contact Paul Gamble or Sarah Kastriner if you have questions about this workshop or need childcare.

For information about FGC Stewardship Services contact:

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