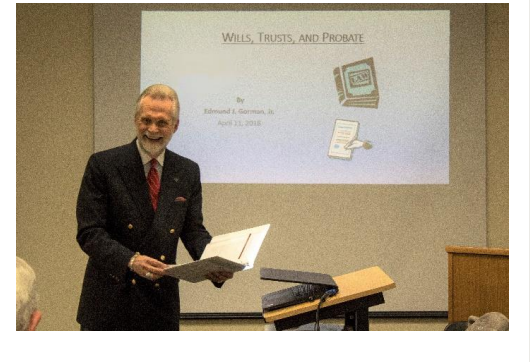


# Impact Report 2018

## Family Estate Planning Series

### Engagement

The Family Estate Planning Series is a series of classes offered through a collaboration between the Community Foundation of Western Nevada, KNPB, and a dozen local charities. The classes cover financial topics, ideas and strategies not often discussed taught by volunteer professionals.



### Action

There were two series offered in 2018: one in the fall and one in the spring. Classes covered estate planning, wills, probate and trusts, responsibilities of fiduciaries, executors and successor trustees, gift taxes, estate taxes, transfer taxes, powers of attorney, health care directives, Medicaid, protection of digital assets, and planned giving. 2018 saw its highest number of attendees yet, averaging about 100 total attendees per week.

### Evaluation

- 94% of participants found new or interesting information on the presenting nonprofit organizations
- 99% of participants would recommend the Family Estate Planning Series to a family member or friend
- Average rating of the Family Estate Planning Series overall was 4.8 out of 5
- Participant's knowledge on estate planning increased by 68% on average
- 33% of participants are more likely to leave a portion of their estate to charity as result of the Family Estate Planning Series
- 84% of participants felt more prepared to leave a legacy for their family as a result of the Family Estate Planning Series
- 80% of participants felt less stressed about estate planning as a result of the Family Estate Planning Series
- 89% of participants will create or change their will/trust/estate plan
- 76% of participants will hire an attorney to create their will/trust/estate plan

### Limitations

While the Family Estate Planning Series has happened since 2010, it was not evaluated until Fall 2018. While surveys were collected that assessed participant feedback, there was no evidence that participant changes were the result of the series. We could not differentiate between correlation and causation. However, we updated our survey this year to measure how the series impacted members of our community.

Read other stories of Impact at [nevadafund.org/impact](https://nevadafund.org/impact)

Learn more about the Family Estate Planning Series at <https://nevadafund.org/family-estate-planning-series/>



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