



# Investing in the FUTURE

## Early Beginnings at Trinity Valley School

Gibson Family Joins the Stephen Seleny Society

Kristie (Taliaferro) Gibson became part of the Trinity Valley School family in 1981 as a kindergartner in Mrs. Newton's class. Brian Gibson joined the TVS family in 1991 as a junior after returning to Fort Worth following his father's retirement from the Air Force. They married in 1998 and their daughter, Grace, entered the TVS family in 2012 as a second-generation member of Mrs. Newton's class.

Family is important, and the Gibsons love their TVS family. Nurturing lifelong friendships and preparing them for a lifetime love of learning, the school was an important part of growing up for the Gibsons.

As members of the alumni board, the Gibsons got to know the "new" Dutch Branch campus (they had attended TVS on McCart) and became familiar with how the school was working to meet the needs of students in a rapidly changing world. Now as parents, they are especially excited to see how TVS is growing, including new facilities, expanded class offerings, a wide array of extracurricular opportunities and continuing education for faculty.

When people are as important to you as family, one way you can provide for them is through your will. Like many couples, Kristie and Brian created their first wills shortly after the birth of their child. Certain organizations, like their church and TVS, were important enough to treat like family and became part of their estate plan. Through the Gibsons' gift in their will to the Stephen Seleny Society, TVS will benefit from their generosity even after their lifetimes.



Brian and Kristie Gibson and their daughter, Grace.

We are glad you are part of the Trinity Valley School family. We hope you consider including TVS in your legacy plans. Contact Margaret Kramer at 817.321.0100 or [kramerm@trinityvalleyschool.org](mailto:kramerm@trinityvalleyschool.org) with any questions.

# Putting Your Values Front and Center

Sharing Your Personal Goals With Professional Advisors

Professional advisors naturally concentrate their efforts on the value of your estate and the taxes it will eventually generate. They recommend helpful strategies to reduce the tax bite, but little more than your net worth is shared with them.



## A Better Alternative

Make sure you discuss your personal values and goals with your professional advisors during the planning process so your long-term plans are built around these important standards. To help your advisors get an idea of your values and goals:

- Share what is important to you.
- Document what you stand for in life.
- Tell them how you want to be remembered by your family and community.



## Involve Your Family

Many families build mission statements as part of this process to help clarify and emphasize the values and legacy they want to leave behind. This mission statement can then become the core document in all your plans, whether it's for estate tax planning, capital gains taxes or philanthropy.

To develop a mission statement with your family, sit down and discuss what your family believes are priorities in life and how you want to make a lasting impact as a group.



## The Best Outcome

By declaring what you care about first, your advisors can build a plan with you that embraces and fulfills your values and goals—all while putting your family's financial security first.

If you are interested in including a gift to TVS in your estate plan, feel free to contact us to learn about your options.

## 3 Simple Actions You Can Take Today

- 1** Go to [www.trinityvalleyschool.org](http://www.trinityvalleyschool.org) to learn more about the good work we're doing and how you can help.
- 2** Return the enclosed reply card to get your FREE guide *The Top 6 Questions to Ask Your Estate Planning Attorney*.
- 3** Contact Margaret Kramer at [kramerm@trinityvalleyschool.org](mailto:kramerm@trinityvalleyschool.org) or 817.321.0100 if you'd like to walk through your giving options in person and at no obligation.



# TVS

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