

You're cordially invited to join us.

ST. PETER'S HEALTH FOUNDATION PRESENTS

Planning Today for the People and Causes You Love

A COMPLIMENTARY PRESENTATION & LUNCH

Making thoughtful decisions about your estate can provide peace of mind for your family and create lasting impact in the Helena community.

WEDNESDAY, APRIL 8, 2026
12:30-1:30PM

Join St. Peter's Health Foundation for a conversation about:

- Why charitable giving is important to estate planning
- Approaches to giving with intention and tax awareness
- Common charitable strategies used in estate plans
- Guidance for aligning values, family goals, and giving to causes close to your heart



Led by Bill Davies, CFP, JD
Estate Planning Professional,
U.S. Bank Private Wealth Management

ST. PETER'S HEALTH
EDUCATION CENTER (MAIN ENTRANCE)
2475 E. BROADWAY STREET | HELENA, MT

Lunch will be provided. Seating is limited.
RSVP by April 3 to the St. Peter's Health Foundation
KTooley@sphealth.org or 406-444-2370



St. Peter's Health
FOUNDATION