

# Planning Your Legacy

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4 Easy Steps  
to a God-Honoring,  
Money-Saving Will



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# Planning Your Legacy

## 4 Easy Steps to a God-Honoring, Money-Saving Will

We know how important it is to you that you honor God with your finances, ensuring that they not only provide for your (and your family's) future, but bless the ministries that you care about as well.

This guide is designed to help you begin the process of planning for your future. We encourage you to prayerfully fill out each section, as best you can, before visiting an estate planning attorney.

The short time you invest in working through this guide will save you both time and money when you actually meet with an attorney. It will also allow you to think and pray through things at your own pace, so that you can have confidence and peace about your decisions regarding your financial future.

A couple of tips to help you while you work through the guide:

- If you come to a question that doesn't apply to you, simply leave it blank.
- Make a note of any question you want to ask your attorney.

When you finish, simply print a copy of the guide to take with you when you meet with your attorney, while keeping a copy for your records.

## Step 1. Our Family

### You

Full Name: \_\_\_\_\_

Other names by which you have been known: \_\_\_\_\_

Citizenship: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Status:  Single     Married     Widowed  
 Separated     Divorced     Re-Married

Existing will?     Yes     No

If yes, what is the date of that will? \_\_\_\_\_

## Spouse (if applicable)

Full Name:

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Other names by which you have been known:

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Citizenship:

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Date of Birth:

---

Social Security Number:

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Status:       Single       Married       Widowed  
 Separated       Divorced       Re-Married

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Existing will?       Yes       No

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If yes, what is the date of that will?

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## Children (including legally adopted, predeceased, or children by other marriages)

### Child #1

Full Name:

---

Relationship:

---

Date of Birth:

---

City/State:

---

Special needs?       Yes       No

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If married, spouse's name:

---

Any children born of this child's marriage?       Yes       No

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If yes, list names and ages:

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## Child #2

Full Name:

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Relationship:

---

Date of Birth:

---

City/State:

---

Special needs?  Yes  No

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If married, spouse's name:

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Any children born of this child's marriage?  Yes  No

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If yes, list names and ages:

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## Child #3

Full Name:

---

Relationship:

---

Date of Birth:

---

City/State:

---

Special needs?  Yes  No

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If married, spouse's name:

---

Any children born of this child's marriage?  Yes  No

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If yes, list names and ages:

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## Child #4

Full Name:

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Relationship:

---

Date of Birth:

---

City/State:

---

Special needs?  Yes  No

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If married, spouse's name:

---

Any children born of this child's marriage?  Yes  No

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If yes, list names and ages:

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## Child #5

Full Name:

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Relationship:

---

Date of Birth:

---

City/State:

---

Special needs?  Yes  No

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If married, spouse's name:

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Any children born of this child's marriage?  Yes  No

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If yes, list names and ages:

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## More Children

If you have more than five children, you may list their information here or attach a separate sheet of paper.

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## Step 2. The People We Trust

### Guardianship

Who would you want to be the guardian of any minor children if both you and your spouse are deceased?

First Choice:

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Contact Information:

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Second Choice:

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Contact Information:

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### Trustee

If you and your spouse died leaving minor children, who would you want to manage their property until they are old enough to handle it on their own?

First Choice:

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Contact Information:

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Second Choice:

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Contact Information:

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How and when would you like the assets in the Children's Trust distributed?

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#### Examples:

- All paid out when my youngest is 25 years old
- 1/3 when my youngest is 21, 1/3 at 26, and 1/3 at 30
- 1/2 when my youngest is 25 and 1/2 at 30

Other instructions?

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# Executor or Personal Representative

Who would you want to supervise the execution of your will and final distribution of your property?

First Choice:

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Contact Information:

---

Second Choice:

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Contact Information:

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Do you want to compensate your Executor or Personal Representative?  Yes  No

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# Power of Attorney

Who do you want to handle your affairs if you're unavailable or unable to do so?

## Financial/Business Matters

First Choice:

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Contact Information:

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Second Choice:

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Contact Information:

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## Health-Care Decisions

First Choice:

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Contact information:

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Second Choice:

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Contact Information:

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## Special Instructions

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## Step 3. Our Money and Belongings

### What You Own (Assets)

#### Checking

Institution Name and Address:

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Name(s) on account:

---

\$ Value:

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If you have more than one checking account, list the institution name and address, name(s) on account, and \$ value here:

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#### Savings

Institution Name and Address:

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Name(s) on account:

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\$ Value:

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If you have more than one savings account, list the institution name and address, name(s) on account, and \$ value here:

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#### Certificates of Deposit

Institution Name and Address:

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Name(s) on account:

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\$ Value:

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If you have more than one Certificate of Deposit, list the institution name and address, name(s) on account, and \$ value here:

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## Securities (stocks, bonds, mortgages, notes or trust deeds)

Type of Account:

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Institution Name and Address:

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Name(s) on account:

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\$ Value:

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If you have more than one Securities account, list the type of account, institution name and address, name(s) on account, and \$ value here:

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## Annuities

Institution Name and Address:

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Name(s) on account:

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\$ Value:

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If you have more than one annuity, list the institution name and address, name(s) on account, and \$ value here:

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## Retirement Accounts

Type of Account:

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Institution Name and Address:

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Name(s) on account:

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\$ Value:

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If you have more than one retirement account, list the type of account, institution name and address, name(s) on account, and \$ value here:

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## Additional Assets (business property, limited partnerships, notes receivable, etc.)

Description:

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Owner:

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\$ Value:

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If you have additional assets, provide the description, owner and \$ value here:

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## Life Insurance

Life Insurance Company:

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Beneficiaries:

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Face Value:

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If you have more than one life insurance policy, list the company, beneficiaries and face value here:

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## Homes and Real Estate

Home/Real Estate Description:

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Address:

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Name(s) on title:

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Approximate \$ Value:

If you have more than one home or property, list the home/real estate description, address, name(s) on title and approximate \$ value here:

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## Vehicles (automobile, RV, motorcycle, watercraft, etc)

Vehicle Description:

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Owner:

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\$ Value:

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If you have more than one vehicle, list the description, owner name, and \$ value here:

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## Household Items (furnishings, antiques, jewelry, collectibles)

Description:

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Owner:

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\$ Value:

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List other significant household items here – including description, owner and \$ value:

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# What You Owe (Liabilities)

## Loans, mortgages, credit cards and other debts

Description:

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\$ Amount:

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Description:

---

\$ Amount:

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Description:

---

\$ Amount:

---

List any additional debts here – provide the description and \$ amount:

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## Step 4. People and Ministries We Want to Bless

Not only does a will protect and provide for your family, it also communicates your values to them and your heart for the Lord’s work. For many Christians, a gift from their will (called a “bequest”) is the largest contribution they will ever make to ministry — impacting people for Christ for generations to come. The most common approaches for ministry bequests are:

- **Add “Charity” to your family.** Some families treat charitable organizations, such as Seattle’s Union Gospel Mission, like one additional child. For example, if a family has three children, they might add a fourth child named “Charity” and divide the assets in their will into four equal parts. Each of their children would receive 25%, and the remaining 25% would be divided among their favorite charitable organizations. You can include a gift to Seattle’s Union Gospel Mission in your will. **Our IRS ID Number is 91-0595029.**
- **Percentage of your estate.** Other families commit a percentage of their estate to the ministry organizations they love, dividing the remaining percentage among their heirs.
- **Set a cap.** Others prayerfully decide on a “cap” for their children’s inheritance, leaving the rest of their assets to advance the Lord’s work here and around the world. This approach is used when the parents want to provide a modest gift to bless their children and do not want to create dependence or give too much too soon.

**List the people, churches, and ministry organizations below to whom you wish to make a bequest:**

**1.** Name of Person or Charitable Organization:

City/State:

Percentage or dollar amount of your estate you wish to leave to this person or organization:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

**2.** Name of Person or Charitable Organization:

City/State:

Percentage or dollar amount of your estate you wish to leave to this person or organization:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

**3.** Name of Person or Charitable Organization:

City/State:

Percentage or dollar amount of your estate you wish to leave to this person or organization:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

**4.** Name of Person or Charitable Organization:

City/State:

Percentage or dollar amount of your estate you wish to leave to this person or organization:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

**5.** Name of Person or Charitable Organization:

City/State:

Percentage or dollar amount of your estate you wish to leave to this person or organization:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

**6.** Name of Person or Charitable Organization:

City/State:

Percentage or dollar amount of your estate you wish to leave to this person or organization:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

**Congratulations! You did it! Print a copy of this document for your records and a duplicate copy for your estate planning attorney.**

May the Lord bless you as you faithfully follow His leading in your life and use the resources He has given you to leave an eternal legacy — spreading the joy of the Lord for generations to come!