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RECORD BOOK

PERSONAL ESTATE PLANNING KIT

So you can extend your impact and take
care of those you love and support



3 Reasons You Should Start Using This Record Book Now

You owe it to yourself and your family to complete your personal estate planning record. Keep in mind that as you progress with your estate planning, your attorney should counsel you on all aspects of your plans as well as draft all legal documents. Of course, we would also be happy to assist you with your charitable intentions at the outset or after you have completed your record.

Good to Know!

If you're married or partnered, you and your spouse should prepare separate record books. While some sections contain shared information, most sections are distinctly personal. Plus it makes it easier for loved ones to manage your unique affairs over time. For additional copies of this record book, please contact us.

1

Your record provides important personal information about you and your family that will be helpful to your executor (personal representative) when it comes time to settle your estate. Your executor will be able to locate beneficiaries, your safe-deposit box, abstracts, titles, stock or bond certificates, will, trust agreements and other important documents.

2

Your record serves as the basis for creating your estate plan and providing for the future well-being of your family and the causes you care about most. It will show you what constitutes your estate and what your beneficiaries can inherit. It will prompt you to consider the disposition of your assets. Will your assets pass by joint ownership? Are they documented for distribution in some other way? Or must you address their distribution in your will? If you have not yet made a will, you will find it easier to do so with this information at hand.

3

Your record also serves as a basis from which to determine what your estate taxes would be under various plans of distribution. Knowing the assets and the values to be considered will help you and your advisors find ways to minimize estate taxes and identify liquid assets to cover estate settlement expenses.

How to Use This Record Book

Step 1: To complete the forms, simply click inside the blue boxes. Begin typing to fill them in with the appropriate information.*

Step 2: To save your work, go to the File menu and select "Save As." Rename the file using a unique file name or the date and save it to your desktop or another easy-to-access location. (By renaming the file, you will be able to use the original record book file again and again.)

Step 3: When you are finished, print the completed records and keep them in a secure place, such as a safe-deposit box.

*You may also print the forms and fill them out by hand.

::trackpersonalinfo

You

You owe it to yourself and your family to complete your personal estate planning record. Keep in mind that as you progress with your estate planning, your attorney should counsel you on all aspects of your plans as well as draft all legal documents. Of course, we would also be happy to assist you with your charitable intentions at the outset or after you have completed your record.

Your name (Please print above.)

 Address

 City, State ZIP

 Home phone/cell phone

 Email

 Date of birth/birthplace

 Location of birth certificate

 Location of adoption documents

 Social Security number

 Driver's license number and state

 Location of tax records

 Location of titles, abstracts and leases

 Location of stock and bond certificates

 Military service, branch, years of service

 Location of military documents

Continued on Page 4

::trackpersonalinfo

You

First spouse's name

Date of first marriage/location of certificate

Prenuptial agreement/location of document

Date of divorce, annulment, legal separation or death (Please print above.)

Location of documents

Second spouse's name

Date of second marriage/location of certificate

Prenuptial agreement/location of document

Date of divorce, annulment, legal separation or death

Location of documents

Your Parents

Mother's name

Address

City, State ZIP

Home phone/cell phone

Email

Date of birth/birthplace

Location of birth certificate

Date of death/resting place

Location of death certificate

Continued on Page 5

::trackpersonalinfo

Your Parents

Social Security number

Father's name

Address

City, State ZIP (Please print above.)

Home phone/cell phone

Email

Date of birth/birthplace

Location of birth certificate

Date of death/resting place

Location of death certificate

Social Security number

Your Spouse

Spouse's name

Maiden name

Date of birth/birthplace

Location of birth certificate

Social Security number

Driver's license number and state

Your Children

First child's name/phone number

Continued on Page 6

::trackpersonalinfo

Your Children

Date of birth/birthplace

Location of birth certificate

Location of adoption documents

Social Security number (Please print above.)

Driver's license number and state

Second child's name/phone number

Date of birth/birthplace

Location of birth certificate

Location of adoption documents

Social Security number

Driver's license number and state

Third child's name/phone number

Date of birth/birthplace

Location of birth certificate

Location of adoption documents

Social Security number

Driver's license number and state

Fourth child's name/phone number

Date of birth/birthplace

Location of birth certificate

Continued on Page 7

::trackpersonalinfo

Your Children

Location of adoption documents

Social Security number

Driver's license number and state

Fifth child's name/phone number (Please print above.)

Date of birth/birthplace

Location of birth certificate

Location of adoption documents

Social Security number

Driver's license number and state

Your Pets

First pet's name/species and coloring

Vet's contact information

Food/other care

Second pet's name/species and coloring

Vet's contact information

Food/other care

Third pet's name/species and coloring

Vet's contact information

Food/other care

::trackpersonalinfo

Current/Retired Employer(s)

Employer's Contact Information

Are you retired? ☐ Yes ☐ No

Company name (Please print above.)

Phone

Supervisor

Current benefits and location of documents

Position

Start date (and end date, if retired)

Ownership interest ☐ Yes ☐ No

Employer's Contact Information

Company name

Phone

Supervisor

Current benefits and location of documents

Position

Start date (and end date, if retired)

Ownership interest ☐ Yes ☐ No

Previous Employer(s)

Employer's Contact Information

Company name

Phone

Supervisor

Current benefits and location of documents

Position

Start date and end date

Ownership interest ☐ Yes ☐ No

Employer's Contact Information

Company name

Phone

Supervisor

Current benefits and location of documents

Position

Start date and end date

Ownership interest ☐ Yes ☐ No

::trackpersonalinfo

Will and Trust

Do you have a will? ☐ Yes ☐ No

Are you the creator or beneficiary of any trusts? ☐ Yes ☐ No

Please record documents here:

Document title (Please print above.)

Date prepared

Prepared by (name, title, contact information)

Location of document

Location of copies

Executor or trustee

Alternate executor or trustee

Additional notes

Document title

Date prepared

Prepared by (name, title, contact information)

Location of document

Location of copies

Executor or trustee

Alternate executor or trustee

Additional notes

::trackpersonalinfo

Power of Attorney

Have you signed a financial durable power of attorney? ☐ Yes ☐ No

Document title (Please print above.)

Date prepared

Prepared by (name, title, contact information)

Name of person appointed to act on your behalf

Names of alternates to act on your behalf

Effective date of power holder to act: ☐ Immediately ☐ Upon your incapacity ☐ Other

Location of original document

Location of copies

Additional notes

Health Care Directives

Do you have a living will? ☐ Yes ☐ No

Do you have a health care power of attorney? ☐ Yes ☐ No

Name of person appointed to act on your behalf

Names of alternates to act on your behalf

Continued on Page 11

::trackpersonalinfo

Health Care Directives

Please record documents here:

Document title

Date prepared

Effective date for power holder to act: ☐ Immediately ☐ Upon your incapacity ☐ Other

Prepared by (name, title, contact information) (Please print above.)

Location of original document

Locations of copies (We suggest attaching a copy to this record book.)

Document title

Date prepared

Effective date for power holder to act: ☐ Immediately ☐ Upon your incapacity ☐ Other

Prepared by (name, title, contact information)

Location of original document

Locations of copies (We suggest attaching a copy to this record book.)

Long-Term Care

Do you have a long-term care insurance policy? ☐ Yes ☐ No

Insurance agent's name

Company name

Policy number

::trackpersonalinfo

Body, Organ and Tissue Donations

Do you wish to donate your body, organs or tissues? ☐ Yes ☐ No

First donation (identify the particular organ or tissue, or indicate entire body) (Please print above.)

Receiving organization's name and contact information

Location of documents

Second donation (identify the particular organ or tissue)

Receiving organization's name and contact information

Location of documents

Third donation (identify the particular organ or tissue)

Receiving organization's name and contact information

Location of documents

Please note: This is not intended as a legal form. Consult with your doctor and attorney today to create the appropriate documents.

Secured Place

Do you have a safe-deposit box? ☐ Yes ☐ No

Bank name, branch location and contact information

People with authorized access

Box number and location of keys

Contents

::trackpersonalinfo

Passwords

First product/service, account name, user name or account number/password (Please print above.)

Second product/service, account name, user name or account number/password

Third product/service, account name, user name or account number/password

Fourth product/service, account name, user name or account number/password

Funeral Instructions

You have a preference. That's why it is not unusual for you to plan your funeral arrangements now. When the day arrives, your family will lovingly appreciate your proactive nature and concern for them as well.

Funeral home preference

Type of preparation ☐ Cremation ☐ Burial ☐ Donation of body

Location of memorial service

Cemetery preference

Casket and vault preference

Pastor preference

Casket bearer 1

Casket bearer 2

Casket bearer 3

Casket bearer 4

Casket bearer 5

Casket bearer 6

Music Preferences

Song/Hymn 1

Continued on Page 14

::trackpersonalinfo

Funeral Instructions

Song/Hymn 2 (Please print above.)

Song/Hymn 3

Song/Hymn 4

Soloist name

Soloist name

Organist name

Favorite Scriptures

Reading 1

Reading 2

Reading 3

Reading 4

Favorite flowers

Memorial ideas

Type of service (Open or closed casket, religious or secular, and any other preferences)

Headstone preference

Burial clothing preference

Obituary (Things you want included and newspapers where you want it published)

::trackpersonalinfo

Other Matters That Need Family Attention

Here's a checklist of actions that need completion in the period of time between your death and up to a year after. Check the boxes that apply to you, so your family members can take care of them later.

- ☐ **Contact the attorney to have the will read** and to see what has to be done in regard to estate settlement.
- ☐ **Contact the Social Security Administration.** Social Security pays a lump sum death benefit of \$255. A surviving spouse can get survivor's benefits as early as age 60—earlier if a surviving spouse is disabled. Children under age 18 may also be entitled to survivor's benefits when a parent dies.
- ☐ **Call the Veterans Administration (VA).** A surviving spouse and dependent children may be entitled to a small pension if the deceased served in the Armed Forces. The VA will pay partial burial expenses and provide a headstone or marker as well as an American flag to drape over the casket, without charge. If burial is in a national cemetery, the VA will provide a grave site and pay burial costs.
- ☐ **Notify organizations where the deceased held memberships.** Some offer memorial services. They may have life insurance and may return part of dues paid. Organizations to notify: _____
- ☐ **Contact former employers for benefits** resulting from that employment. Refer to the list in the employment history section (see Page 8).
- ☐ **Collect life insurance policies and call the companies and ask for death claim forms.** The beneficiary can choose to take proceeds in a lump sum or spread them out as payments over the years.
- ☐ **Contact companies holding retirement plans.** There may be money left in them to be paid out to survivors. Like life insurance, proceeds can be paid out in a lump sum or in installments. Tax advisors should be consulted before beneficiaries make that decision.
- ☐ **Consult with the health insurance company.** It may pay some expenses of your last illness. Future premiums may also be less if the policy has covered two or more people and now there will be one less person covered. Some health insurance policies are also combination policies that provide some death benefits.



HOW TO TELL “Mine” From “Ours”

Sole property is anything that belongs to you alone. **Joint property** are items that are shared. To determine whether or not you can pass all or part of an asset by your will, you should know the form of title. There are four ways property can be owned jointly.

1. Joint tenancy with right of survivorship.

When one owner passes away, the surviving joint owner owns the entire asset.

2. Tenancy in common.

You and others have an undivided interest in an asset. You can pass your interest by will. The surviving joint tenant doesn't automatically take title to your interest.

3. Tenancy by the entirety.

This form of ownership is recognized by many states. It's limited to married couples and generally to real property.

4. Community property.

This is a form of property ownership between spouses in select states. Generally, all property acquired during marriage is community property, regardless of which spouse holds title. You can will only half the property; the other half belongs to your surviving spouse.

:: calculate estate's worth

Worksheets to Help You Create Your Estate

What Is Your Estate Really Worth?

Your estate's value from an estate planning viewpoint is different from your net worth, which is a snapshot of what you own and what you owe.

Fortunately, most people find they have much more in their estate than they thought when they account for savings, employer and personal life insurance, retirement plan benefits and perhaps even a future inheritance. For estate planning purposes, an inventory of your assets and liabilities will help you determine what you can leave to your heirs after your lifetime and how to best provide for the distribution of your estate.

Make an Inventory of Your Assets

If you are married, be sure to include your spouse's assets and all jointly owned or community property. Use the current market value for everything you own and the face value (not cash value) for any life insurance. Don't strive for exact amounts; round numbers will do.

Make Property Decisions

Once you've made an inventory of your property, you're ready to decide where you want it to go. The following pages can help you organize your plans.

Once the worksheets are complete, you are ready to meet with your attorney for important counsel and the drafting of necessary documents.

::calculateestate'sworth

List Your Assets

1. Cash (savings, money market and checking accounts, CDs)

[illegible]

2. Real Estate

Description and location of property	Date of purchase	Cost basis	Owned by you alone	Owned by your spouse	Owned jointly or community
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$

3. Stocks, bonds, mutual funds

[illegible]

4. Obligations due me (mortgages held, notes receivable, accounts receivable)

[illegible]

List Your Assets

[illegible][illegible][illegible]

::calculateestate'sworth

List Your Assets

8. Retirement benefits (pension, profit-sharing, IRAs, Keogh plans, etc., including face amounts of life insurance owned in the retirement plan)

Description	Beneficiary	Value of Interest	
		Owned by you alone	Owned by your spouse
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$

9. Business interests owned (proprietorship, partnership, corporation)

Business name and address	Cost basis	Owned by you alone	Value of Interest	
			Owned by your spouse	Owned jointly or community
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$

10. Other assets potentially includable in estate because of your interest in them (interest in a trust or estate, royalties, patents, copyrights, trademarks, etc.)

Description	Cost basis	Owned by you alone	Current Value	
			Owned by your spouse	Owned jointly or community
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$

		Owned by you alone	Owned by your spouse	Owned jointly or community
TOTAL OF ALL ASSETS		\$	\$	\$

List Your Liabilities (approximate balances owed)

Description of property	Name of creditor	Owed by you alone	Owed by your spouse	Owed jointly
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$

Description	Name of creditor	Owed by you alone	Owed by your spouse	Owed jointly
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
		\$ _____	\$ _____	\$ _____

[illegible][illegible]

::calculateestate'sworth

List Your Liabilities (approximate balances owed)

5. All other liabilities

Description	Owed by you alone	Owed by your spouse	Owed jointly
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

	Owed by you alone	Owed by your spouse	Owed jointly
TOTAL OF ALL LIABILITIES	\$ _____	\$ _____	\$ _____

	You	Your spouse	Joint
Total of all assets	\$ _____	\$ _____	\$ _____
Minus total of all liabilities	(_____)	(_____)	(_____)
NET ESTATE (estimated)	\$ _____	\$ _____	\$ _____

::dispositionofestate

Who Gets What?

Now that you've determined which assets comprise your estate and their values, you need to indicate who you want to inherit your assets.

1. Gifts to spouse (indicate a contingent beneficiary in case your spouse does not survive you)

Description of asset or percentage of estate	Name/Relationship/Address
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

2. To other beneficiaries

Description of asset or percentage of estate	Name of Beneficiary/Relationship/Address
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

3. To charitable organizations

Name and address of charitable organization	Percentage of net estate	Dollar amount
<hr/>	<hr/>	% OR \$ <hr/>
<hr/>	<hr/>	% OR \$ <hr/>
<hr/>	<hr/>	% OR \$ <hr/>
<hr/>	<hr/>	% OR \$ <hr/>

Name and address of charitable organization	Description of specific asset
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

::dispositionofestate

Who Gets What?

4. Residue of estate

Name and address of charitable organization	Percent of residuary estate
_____	_____ %
_____	_____ %
_____	_____ %
Name and address of other beneficiaries	Percent of residuary estate
_____	_____ %
_____	_____ %
_____	_____ %

Gifts That Give Back!



A generous gift to us should not supplant your personal and family concerns, of course. However, you will reap benefits from your philanthropy that have practical consequences.

Income tax benefits. A gift to a qualified charitable organization may entitle you to an income tax charitable deduction when you itemize.

Capital gains tax savings. When you donate appreciated property you have held for more than one year to a qualified charitable organization, you can reduce or even eliminate capital gains taxes on the transfer. You may also qualify for an income tax charitable deduction based on the fair market value of the securities at the time of the transfer.

Lifetime income. If you desire, you can receive an assured income for life through a planned gift.

::considercharitablechoices

How You, Your Family and Your Favorite Causes Can Benefit

Once you have completed this record book, you are ready to meet with your attorney and other professional advisors for their important counsel and the drafting of necessary documents.

We hope that as part of your planning you consider making a gift to us in your will or through some other form of gift planning. A gift to us, however, should never come before your personal or family needs. That's the beauty of a planned gift—you come first. Depending on the type of gift you choose, you may potentially reap benefits from your philanthropy

that have very practical and desirable outcomes, such as the following:

- Ability to leave a legacy
- Income tax benefits
- A life income
- Reduce or eliminate capital gains taxes
- Personal satisfaction

Whatever your objective, we can help match your needs with the right giving tool to provide the most benefits for you, your family and us.

Please contact us and we'll be happy to explain the choices available to you—without obligation.