**Income Interest**
In a trust, the right to receive payments from the trust for lifetime or a term of years.

**Living Will**
Written instructions expressing your wishes regarding life support and other medical interventions. Also known as an Advanced Directive.

**Personal Property**
Securities, artwork, business interests and items of tangible property as opposed to real property (the term real property is used in gift planning to refer to land and the structures built on it).

**Personal Representative**
See Executor, above.

**Remainder Interest**
In a trust, the portion of the principal left after the income interest has been paid to the beneficiary(ies). A charitable remainder trust pays income to the benefactor or other individuals and then passes its remainder to charity.

**Trust**
A transfer of property by the Grantor to the care of an individual or organization, for the benefit of the Grantor or others.

**Trustee**
An individual or organization carrying out the wishes of the person who established the trust (the Grantor), paying income to the beneficiaries and preserving the principal for ultimate distribution.

**1099-R**
The IRS forms that we send our life-income gift participants detailing how payments they received from their gifts during the year will be taxed.

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Metropolitan Community Churches is not engaged in rendering legal or tax advisory services. For advice or assistance in specific cases, the services of an attorney or other professional advisor should be obtained. The purpose of this publication is to provide accurate and authoritative information of a general character only. Watch for tax revisions. State laws govern wills, trusts and most charitable gifts made in a contractual agreement. Advice from legal counsel should be sought when considering these types of gifts. Calculations of tax deductions will vary based on applicable federal discount rates, which change on a monthly basis. Check for current deduction amounts before completing your gift.
Supporting Metropolitan Community Churches is an effort that unites thousands of people every year. The decision to give to the MCC is personal. Most discussions about giving begin and end with values — your personal values and our shared community values.

We hope to inspire you to prepare for your family’s financial future by completing your will. The Estate Planning Workbook portion of this booklet is designed to help you organize the personal information you will need to draft your will.

The most important thing is to get started now so you can make your wishes known to your heirs.

As you reflect on how to allocate your estate, we hope you will consider supporting the organizations you value most. We will also share a few approaches other MCC donors have used to express their philanthropic values.

Making a direct bequest to family members and to the charities you care about is the most common form of giving. We will outline how other giving options might allow you to help MCC and to preserve resources for yourself during your lifetime or for your beneficiaries.

If you need additional information, email plannedgiving@mccchurch.org. An MCC Planned Giving Manager will be happy to answer your questions and help you consider options for an estate plan that reflects your wishes and values.

With many thanks for your support of MCC.

Rev. Elder Dr. Nancy Wilson
Moderator, Metropolitan Community Churches

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**Glossary of Estate Planning Terms**

**Actuarial**
As used in gift planning, refers to the factors used to calculate the value of lifetime payments to individuals or organizations.

**Adjusted Gross Income (AGI)**
The sum of an individual’s taxable income for the year is the total at the bottom of the first page of Form 1040. Individuals may deduct charitable cash contributions up to 50 percent of AGI; they may deduct gifts of appreciated securities and appreciated property up to 30 percent of AGI.

**Advanced Directive**
Written instructions expressing your wishes regarding life support and other medical interventions. Also known as a Living Will.

**Annuity**
A contractual arrangement to pay a fixed sum of money to an individual at regular intervals. The charitable gift annuity is a gift that secures fixed lifetime payments to the benefactor and/or another individual.

**Appraisal**
An assessment of the value of a piece of property. Benefactors contributing real or tangible personal property (art, books, collectibles, etc.) must secure an independent appraisal of the property to substantiate the value they claim as a charitable deduction.

**Appreciated Property**
Securities, real estate or any other property that has risen in value since the benefactor acquired it. Generally, appreciated property held by the donor for a year or more may be donated at full fair market value with no capital gains cost.

**Basis**
The benefactor’s purchase price for an asset, possibly adjusted to reflect subsequent costs or depreciation.

**Beneficiary**
The recipient of a bequest from a will or a distribution from a trust.

**Bequest**
A transfer of personal property to an individual or organization under a will.

**Capital Gains Tax**
A federal tax on the appreciation of an asset between its purchase and sale prices.

**Codicil**
An amendment to a legal document such as a will.

**Estate Tax**
A federal tax on the value of the property held by an individual at his or her death (paid by the individual’s estate, not the heirs or recipients of bequests). In contrast, state inheritance tax is applied to the value of bequests passing to beneficiaries; it is also paid by the estate before the distributions are made.

**Executor**
The person named in a will to administer the estate (known in some states as the Personal Representative).

**Grantor**
The individual transferring property into a trust.
LIVING TRUSTS
Shift assets from your estate, but retain control

A properly-drafted living trust can be a very effective lifetime management tool. The trust is established during one’s lifetime and is usually funded during the grantor’s lifetime, which means that the assets are transferred to the trust during life. The trust is revocable, which means that the grantor may revoke or amend all or part of the trust.

The real value of a living trust is that any asset that passes under the terms of the trust (rather than through the will) avoids probate.

What’s more, real estate or tangible personal property located in a state other than the state where the grantor lives, and where the grantor will be subject to probate, may be held in the trust. This will help avoid the extra burden of a separate probate proceeding in another state.

As with a will, your gift can be of any size and virtually any asset. You can specify the preferred use of your gift — for use by a specific program, your local church or MCC. The provision for MCC can easily be added to your trust agreement, and it may be a specific, contingent, residual or remainder gift.

To ensure that your wishes will be fulfilled, please contact MCC or specific suggestions regarding the wording of your gift.

Questions? Simply contact us and a Gift Planning Manager will be happy to assist you.

Email plannedgiving@mccchurch.net
Introduction

Plan now for a meaningful future

We consider it a privilege to help you prepare your estate plans and get your financial affairs in order.

This Guide and Workbook for Estate Planning and Charitable Giving was developed to be informative and useful. It will help simplify what might otherwise seem a daunting task. In this compact Guide, you’ll find a basic overview of will preparation and ways you can pass along your values as well as your possessions.

As a friend of MCC, you share a legacy of compassion with fellow supporters and the earliest MCC visionaries.

So while you use this Guide to organize your personal information and begin preparing your will, we hope you might remember the important work of the MCC and consider making a legacy gift, of any size, to help ensure our future.

The final pages of the Guide explain many ways you can help. Whether your legacy is directed to MCC or to a specific church or program, no gift has a more lasting impact than a bequest or gift from your estate.

Many donors choose a charitable remainder unitrust for gifts of real estate. The trust can be for one lifetime, multiple lifetimes, or a term of up to 20 years.

Charitable Remainder Annuity Trust

This trust is separately managed to provide payments that do not fluctuate with the market. You receive a fixed percentage of the initial value of the assets placed in the trust. The arrangement is ideal for donors who do not want their annual charitable trust payments tied to market performance.

The charitable remainder annuity trust can be for one lifetime, multiple lifetimes, or for a specified term of up to 20 years.

RETAINED LIFE ESTATES

Remain in your home as long as you choose

Gifts of a retained life estate allow donors to deed their home, vacation home or farm to MCC while retaining the right to live in or use the property for life (or for a term of years). The donor receives an immediate income tax deduction based on the full fair market value of the property reduced by the donor’s benefit of being able to continue to use the property (calculated under IRS rules). These gifts often result in a charitable deduction for a large percentage of the fair market value of the property. The income tax savings generated by the income tax deduction can be used to pay for the property’s maintenance, taxes and insurance, which remain the donor’s responsibility.

This type of gift is most often chosen by donors with homes or vacation homes whose children are not interested in inheriting the property.
**Why Everyone Needs a Will**

**Write your will, or the government decides**

Of all financial documents, perhaps none is more personal or more important than your will. This single instrument conveys the wishes and priorities of a lifetime, and speaks volumes about what matters to you.

A will tells friends and family members precisely how you’d like your material assets distributed after you’re gone. It saves those you leave behind unnecessary distress by clearly articulating your opinions and decisions. It alleviates guesswork, speculation and doubt in the minds of those affected by your death.

Some people mistakenly believe that unless they’ve accumulated great wealth and a complex assortment of financial holdings, they don’t need a will. That’s far from the truth.

Without a legitimate will, the government — not you — will decide how your affairs are handled. There is no guarantee that its choices will be those you would have made.

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**A bucket of flexible income**

- You and/or your designated beneficiaries receive income for life or a term of years
- Immediate income tax deduction for a portion of your contribution to the trust
- No capital gains tax on appreciated assets you donate
- You can make additional gifts as your circumstances allow
- Benefits you now and MCC later

**Charitable Remainder Unitrust**

This is a separately-managed trust that provides for a fixed percentage of the trust’s value, determined annually, to be paid to the named beneficiaries (you, your spouse and/or others). Thus, the arrangement is responsive to market fluctuations, and your payments can provide a hedge against inflation.

**deferred payment charitable gift annuity**

- Immediate income tax deduction for a portion of your gift
- Scheduled fixed payments when you need them
- The longer you defer payments, the higher the effective rate you receive
- Benefits you now and MCC later

**Prepare your will now and you will be able to:**

- Select an individual you trust to serve as executor and make sure your wishes are carried out
- Determine who will serve as guardian of your minor children or dependents and manage their finances
- Make tax-wise decisions for the distribution of your assets
- Ensure friends and causes important to you are included

Once this cornerstone document is in place, you can complete your estate plans with two other important documents: a power of attorney and a living will (also known as an advanced directive). With these documents you can:

- Designate who will have authority to make financial and legal decisions if you become unable to handle your own affairs
- Clarify your feelings regarding end-of-life measures — then empower an individual to carry out your medical wishes
Pass along your possessions and values

In truth, all people have possessions that need to be disbursed when they’re gone. Think about it. Most people possess financial holdings such as checking accounts, saving accounts, retirement savings, real estate, life insurance, stocks and bonds.

Many individuals also have personal belongings like automobiles, artwork, silver flatware, fine china and electronics with real or sentimental value. Family heirlooms of jewelry, photographs and handmade crafts hold great personal value. Unless such items are specifically addressed in an estate plan, disputes can be the source of family discord and arguments.

Keep your will as simple, or as detailed, as you wish

Your will can be as specific, or as general, as you wish. You can include instructions and wishes on virtually any subject — from directing the care of a beloved family pet, to passing along treasured belongings to those who will most appreciate them.

By preparing your will now, you’ll help your loved ones avoid strife and heartache so they can mourn your loss and begin the healing process. You can help reduce the trauma and confusion for those you love. Having your affairs in order for grieving loved ones will give you peace of mind. You can feel confident that you have helped them by fulfilling one of your most important responsibilities: leaving a will, so they can make it through a difficult time. By planning ahead, you can also help organizations continue the good work that you have supported during your lifetime.

Gifts That Benefit You and Keep MCC Strong

Many people wish to take care of loved ones and help MCC. Several types of charitable gifts allow you to do both, while providing dependable payments for life.

The following types of gifts offer the freedom to support MCC. Many also offer an attractive lifetime revenue stream and tax benefits. Take a few moments to learn about each type of gift and select the one that best suits your financial circumstances.

CHARITABLE GIFT ANNUITY

Gives back fixed lifetime payments to you. Helps support MCC after the death of the last beneficiary.

- Immediate income tax deduction
- Dependable, fixed payments for life
- Competitive interest rate based on your age
- Potential savings in capital gains and estate tax
- One- and two-life options available

What It Is

A charitable gift annuity is among the easiest and most popular methods of making a planned charitable gift. It’s a contract that provides fixed payments for life, made to one or two beneficiaries.

The payout rate is based upon the age of the beneficiaries.

How It Works

A charitable gift annuity benefits both you and MCC. You’ll receive an immediate tax deduction plus regular annual payments for as long as you live. Another attractive feature is that a substantial portion of the annual payments is considered a return of principal, so this portion of the payments is tax-free.

Later, the principal will help support our mission long-term, ensuring our disaster relief, services and educational programs will continue far into the future.
When to Revise Your Will

Creating a will is a landmark accomplishment. But even if you already have a will, you’ll want to examine it periodically to make sure it continues to reflect your wishes.

At the very least, your will should be reviewed and possibly revised any time you experience a major life change such as:

- Loss of a spouse
- Birth of children or grandchildren
- Remarriage or divorce
- Major shifts in assets, such as the sale of real estate or a business
- Death of an heir
- Maturation of long-term investments
- Significant change in the health of your proposed executor or alternate executor
- Changes in estate tax laws that impact the distribution of your assets
- Changing relationships with family members or others you may have included

When needed, revisions can be addressed through an amendment, or codicil. This is a simple attachment that can be added to your existing will. For major revisions, it is best to seek professional advice from an attorney.

Get a Head Start on Writing or Updating Your Will

Completing the following workbook will be very helpful in drafting or amending your will. It includes sections on many types of assets, and it will consolidate all of your important information into this single document.

You may not be able to answer all the sections at once. That’s fine. Fill out as much as you’re able. You can always return to sections that require extra research or discussion. The important thing is to stick with it. Don’t let completion of the entire workbook keep you from organizing and acting on your estate plans.

Once you have the basic information filled in, you can meet with your attorney. While it’s best to have as much completed as possible, you can always finish entries later. Every day you wait leaves your heirs unprotected.

For more information on gift opportunities, please review the section that begins on page 36.
Organize Your Thoughts, Feelings and Information

Gathering information for your will can feel overwhelming. But it doesn’t have to be. The process falls into four main phases. Just follow these simple steps.

**STEP 1:**
Learn about your options for estate planning. Spend time with this Guide, including the estate planning information and definitions in the glossary at the end of this workbook. You’ll soon have a basic understanding of the vocabulary and planning tools available to you.

**STEP 2:**
Organize your assets (use the following estate planning pillars checklist and workbook). Systematically complete the workbook, noting account numbers and financial details where prompted. Keep this information in a convenient, secure place so you can easily return to it and continue working if need be.

**STEP 3:**
Meet with an attorney to share your information and formalize your will. With this completed workbook in hand, you’ll be well on your way.

**STEP 4:**
Share your intentions with loved ones, your executor and any charities you may include. At the very least, you should leave a copy of your will with your attorney, and make sure your executor has your attorney’s name and contact information.

If you have any questions or would like any help getting started or completing your estate plans, we invite you to contact the Gift Planning Office at MCC. You can reach us at plannedgiving@mccchurch.org.

**RETIREMENT PLAN ASSETS**
Help minimize estate taxes
In addition to providing for you and your loved ones, retirement investments offer many convenient and cost-effective charitable giving opportunities.

Retirement plan benefits include assets held in individual retirement accounts (IRAs), 401(k) plans, profit-sharing plans, Keogh plans, and 403(b) plans. Special tax considerations make these assets an excellent choice for funding a charitable gift.

Potentially subject to double taxation at your death, funds in your retirement plan may be the most advantageous gift you can make. Unlike other assets, retirement funds are subject to income tax when received by the beneficiaries, in addition to possible estate taxes.

Charitable organizations, like Metropolitan Community Churches, are tax-exempt and are therefore not liable for these unpaid income taxes. Consult your financial advisor for additional information on taxes.

**REAL ESTATE**
An extraordinary gift
MCC accepts all types of real estate, including primary and vacation homes, commercial, undeveloped and rental property. Real estate gifts can be made outright or to fund a charitable remainder unitrust or a gift of a retained life estate. If you are interested in learning more about gifts of real estate, please contact a Gift Planning Manager at plannedgiving@mccchurch.net.

**INSURANCE POLICIES**
Sole or partial beneficiary
Life insurance affords numerous charitable giving options. Metropolitan Community Churches can be named the sole beneficiary of a life insurance policy. We can also be named as a partial beneficiary, allowing you to share your policy amount between multiple beneficiaries.

Many individuals own life insurance policies purchased long ago that are no longer needed to provide necessary protection for loved ones.

A policy that is paid up can earn the donor an income tax deduction when the ownership is transferred to MCC. If a policy is still in effect, MCC can be named both owner and beneficiary. If the MCC decides to keep the policy in effect, the donor will receive additional deductions for any premium payments made. A MCC Gift Planning Manager can explain your options in greater detail.
\textbf{GIFTS OF CASH}

An important and simple way to help a favorite cause

Planned gifts can include gifts of \textit{cash}.

An outright gift of cash qualifies for a full charitable deduction for most donors who itemize on their federal income tax returns. Donors who make a gift in this way recognize the importance of their annual support and enjoy seeing the immediate results of their generosity.

For income tax purposes, current tax law allows you to deduct an amount of up to 50 percent of your annual adjusted gross income for cash gifts. Any deduction in excess of that amount can be carried over for up to five years, until it is used up. For maximum tax benefit, carefully consider the amount and timing of your gift.

\textbf{APPRECIATED SECURITIES}

Save taxes twice

Making a gift of \textit{appreciated securities} is a popular alternative to a cash gift because it saves taxes twice. As long as you’ve held the securities for more than one year, you will receive an income tax deduction for its full fair market value. You’ll also avoid capital gains tax on the appreciation.

What’s more, if appreciated securities are used to make a bequest to MCC, or to fund a charitable trust, gift annuity or other planned gift arrangement, you may realize substantial estate and gift tax savings as well.

You may claim an income tax charitable deduction of up to 30 percent of your annual adjusted gross income for a gift of securities held for more than one year. As with gifts of cash, any deduction you cannot use in the year of your gift may be carried over and used for up to five additional years.

\textbf{Three Pillars of Every Estate Plan}

It’s possible to define the types of decisions this person may make and for how long. Like a living will, a power of attorney may be amended or revoked at any time.

Conveying your wishes in a \textit{will} is important. But two other documents are equally important: a \textit{living will} (also known as an advanced directive) and a \textit{power of attorney}. Both can easily be amended or revoked if you change your mind. But by taking care of these matters now, you can save your loved ones immeasurable grief and stress.

\textbf{A living will} lets medical personnel know whether or not you want measures taken to support your life if and when such measures become needed. These measures can range from temporary nutrition to breathing assistance and more. Most hospitals can provide you a form at no charge. It must be signed well ahead of time, while you are of sound mind, in order to be valid. It’s a good idea to read and complete your living will, and to make sure your family members understand your views on end-of-life issues. Unless you have a living will, medical personnel will do everything within reason to sustain your life. Check your local and state laws for clarification.

\textbf{A power of attorney} gives someone the authority to make decisions for you if you become unable to handle your own affairs.

When selecting an individual to serve in this role, choose carefully. Most people designate a family member or trusted friend. It’s a good idea to discuss this appointment in detail so the individual is clear on his or her responsibilities and will not be surprised by the role.
Use the Following Workbook to Prepare to Meet With Your Estate Planner

Planning Steps:

1. Determine your assets. Use this workbook to make a list of all your assets.

   ⚠️ Do not permit this step to prevent you from continuing with the estate planning process.

2. Identify people and causes you’d like to benefit through your will or estate plan. Consider family, friends, organizations, charities, church, etc. Determine what you would like to leave as a legacy. Consider each beneficiary on your list and decide what benefit you want to give to each one.

3. Determine how you can accomplish your plans. Reading through this Guide will acquaint you with the many gift vehicles available and prepare you to meet with your estate planning professional in Step 6.

4. Decide on an executor, trustee and guardian, as appropriate. Which individuals and institutions do you trust to carry out your wishes? Ask these individuals if they are willing to perform the proposed duties.

5. Consult your attorney and include other estate planning professionals such as financial advisors if needed. Put in place your plan to accomplish your goals. Be sure to complete any required documents.

6. Consult your attorney and include other estate planning professionals such as financial advisors if needed. Put in place your plan to accomplish your goals. Be sure to complete any required documents.

Making a Gift Outside Your Will

Remembering an organization in your will is one way to make a difference. But numerous other assets can pass directly to a beneficiary organization outside your will. Review the types of assets described here, and consider which you might wish to assign to a worthwhile charity like the Metropolitan Community Churches.

The benefit of remembering the MCC outside your will is threefold. First, the value of these gifts need not be included in the total value of your estate, which may reduce the tax liability of your beneficiaries. Second, you will also avoid capital gains tax on the accrued value of certain assets, because the appreciated value can pass directly to Metropolitan Community Churches. Finally, assets that are subject to income tax when received by the named individuals (e.g., IRA funds) can be distributed to MCC who would owe no income tax.

If you have questions or would like assistance directing an asset to the MCC simply contact us and a Gift Planning Manager will be happy to assist you. Please email plannedgiving@mccchurch.net
Testamentary Trust:

In which you establish a trust through your will. Beneficiaries receive income for life or a term of years. This option gives your direct heirs the benefit of your capital during their lifetime or the specified term. At the end of that lifetime or term, Metropolitan Community Churches receives the remainder. Testamentary Planned Gifts

Testamentary Planned Gifts

Through your will, you can also establish any of the planned gifts explained in this booklet (see the pages that follow). For instance, your will can direct that, at your death, a charitable remainder trust or charitable gift annuity be created to provide payments for your loved ones and later to benefit Metropolitan Community Churches.

Testamentary planned gifts can provide welcome tax advantages while providing generous financial benefits to your family and to Metropolitan Community Churches. Retirement plans can also be used to fund any of these planned gifts at your death. If this interests you, please read through the next section carefully.

Then, talk with a MCC Planning Manager and your personal advisor for more detail.
DATE PREPARED: ________________________________

PERSONAL INFORMATION FOR THE ESTATE OF:

Full Name: ________________________________
Current Address: ____________________________
Telephone Number: __________________________

Former Addresses
Former Address #1: __________________________
Former Address #2: __________________________

Marital Status:
□ Single  □ Married  □ Widowed
□ Divorced  □ Separated

Spouse’s Name: ____________________________
Date of Birth: __________
Occupation: ____________________________
Social Security Number: __________
Citizenship (if other than U.S.A.): __________________________

Children of Current Marriage
(including adopted children)
Name: ____________________________
Birthdate: __________  Sex: ______
□ Married Children #: ______  Ages: ______

Location of Birth Certificate: __________________________

Location of Marriage Certificate: __________________________

Any Former Marriages?
You: □ Yes  □ No
Your Spouse: □ Yes  □ No

Social Security Number: __________
Date of Birth: __________
Place of Birth: __________________________
Father’s Name: __________________________
Mother’s Maiden Name: __________________________

Including the MCC in Your Will

<table>
<thead>
<tr>
<th>BEQUEST TYPE</th>
<th>LANGUAGE TO USE (Denomination)</th>
<th>LANGUAGE TO USE (Local Church)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outright Bequest:</strong></td>
<td>“I give, devise, and bequeath to Metropolitan Community Churches (insert dollar amount) Dollars* to be used for its general purposes.”</td>
<td>“I give, devise, and bequeath to Metropolitan Community Churches (insert church name), (insert city and state of church), or its successor, (insert dollar amount) Dollars* to be used for its general purposes.”</td>
</tr>
<tr>
<td><strong>Residual Bequest:</strong></td>
<td>“I give, devise, and bequeath to Metropolitan Community Churches all or a percentage of the remainder of your estate after specific amounts designated for other beneficiaries are distributed and estate-related expenses are paid.”</td>
<td>“I give, devise, and bequeath to Metropolitan Community Churches (insert church name), (insert city and state of church), or its successor, (insert percentage amount) percent of the residue of my estate to be used for its general purposes.”</td>
</tr>
<tr>
<td><strong>Contingent Bequest:</strong></td>
<td>“In the event that (insert name) predeceases me, I give, devise, and bequeath to Metropolitan Community Churches (insert church name), (insert city and state of chapter), or its successor, to be used for its general purposes.”</td>
<td>“In the event that (insert name) predeceases me, I give, devise, and bequeath to Metropolitan Community Churches (insert church name), (insert city and state of church), or its successor, to be used for its general purposes.”</td>
</tr>
</tbody>
</table>

*Instead of a dollar amount, you can also indicate a percentage of your total estate or specifically describe property to be given. Bequest provisions designated for a specific program or activity require additional language. Please contact us for more information if you have a specific purpose in mind for your gift.
Charitable Giving Through Your Will or Estate Plan

Making a legacy gift to MCC isn’t just for the wealthy or for those trying to minimize estate taxes. It’s a wonderful way to leave a legacy and continue a lifetime of support for an organization you believe in. And because of your generosity, and the generosity of thousands like you, your gift of any amount will have a magnified effect on our ability to respond in times of disaster and to provide other important services to the communities we serve.

Legacy gifts can take many forms. The most popular are described here, as well as sample language you may use to include MCC in, or add us to, your will.

Most donors leave their gifts to MCC without restriction. This allows MCC to use these funds to help us fulfill our mission – locally, nationally and around the world. MCC honors a donor’s stated intent for the use of a gift.

Donors who wish to designate the use of any gift, whether made during their life or through their estate, will have that wish honored.

Join a proud tradition of caring

All planned gift donors are made members of the One Spirit, Many Gifts Legacy Society. In honor of their commitment to our lifesaving work, members receive a certificate of appreciation as well as other benefits.

Create a lasting legacy through your will

After providing for family, friends and others in their wills, many individuals also choose to remember organizations important to them. If you believe in the mission of MCC this is an important and lasting way for you to help ensure our lifesaving work will always continue.

See the suggested wording that follows for different types of bequests.

Questions? Simply contact us plannedgiving@mccchurch.net and a Gift Planning Manager will be happy to assist you.

Charitable Giving

Through Your Will or Estate Plan

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Questions? Simply contact us plannedgiving@mccchurch.net and a Gift Planning Manager will be happy to assist you.
Who do you want to have as your Trustee for any trusts that you create in your will or estate plan?

The Trustee will continue to care for any assets that you have left in trust for children or others. The Trustee should have knowledge about investing and administering assets and should be young enough to be available for the length of the trusts. In addition, the Trustee will work with the guardians to handle the assets for the children. The person to be appointed should feel comfortable with that role.

Trustee
Name: __________________________________________
Address: ________________________________________

Backup Trustee
Name: __________________________________________
Address: ________________________________________

Who should be given power of attorney?
This should be someone you trust who has the expertise and concern to handle your affairs if you are incapacitated.
Person to be appointed: ____________________________
Address: ________________________________________

Does your current will or estate plan include these specifics?
If not, and/or if you do not have all of the documents to most effectively address your estate, you should contact your attorney or your estate planning professional to convert your wishes into legal documents. This completed workbook will provide the information necessary to complete your new or revised estate plan.
Important Questions to be Answered

Who should serve as your executor or personal representative?

This should be someone you trust, who is young enough to be available (theoretically) when the estate will need to be probated and who understands the basics of administration and/or working with attorneys. Often spouses will appoint each other, as available, and will appoint a backup in case the spouse is unable to serve.

Executor

Name: ________________________________
Address: ________________________________
Name: ________________________________
Address: ________________________________

Who do you want to have serve as the guardian for your children (if applicable)?

Often young couples believe that they have so little that it is not necessary to have a will. However, one of the most important reasons for them to complete their estate plans is to appoint a guardian for their children. At a time when their lives would be in a terrible uproar, an appointed guardian can help bring a level of stability to the children.

Guardian

Name: ________________________________
Address: ________________________________
Backup Guardian

Name: ________________________________
Address: ________________________________

Tombstone Engraving:

______________________________
______________________________
______________________________

Cemetery Plot
Name of Cemetery: ________________________________
Address: ________________________________

Location of Deed: ________________________________

Persons to be notified at death
Name: ________________________________
Phone Number: ________________________________
Name: ________________________________
Phone Number: ________________________________
Name: ________________________________
Phone Number: ________________________________
Name: ________________________________
Phone Number: ________________________________

Secondary Executors, Trustees or Guardians
Name: ________________________________
Phone Number: ________________________________
Address: ________________________________
Name: ________________________________
Phone Number: ________________________________
Address: ________________________________
Name: ________________________________
Phone Number: ________________________________
Address: ________________________________

In case a trustee is appointed, the trust is to terminate when the youngest child reaches age: __________

Distribution of Estate (Specific Bequests):
Does all of your estate go to your spouse?
☐ Yes  ☐ No

Name of Beneficiary:

______________________________
______________________________
______________________________

Primary Executors, Trustees or Guardians
Name: ________________________________
______________________________
______________________________

CURRENT LAST WILL AND TESTAMENT OR LIVING TRUST, IF ANY

Location of Will or Trust:

______________________________
______________________________
______________________________

Date of Will or Trust:

______________________________
______________________________
______________________________

Item Designated to Beneficiary:

______________________________
______________________________
______________________________
### Distribution of Estate (Residue and Remainder)
List below how assets will be distributed in the event above named individuals are not living or organizations are not in existence at the time your will is probated.

<table>
<thead>
<tr>
<th>Name of Beneficiary:</th>
<th>Relationship:</th>
<th>Address:</th>
<th>Amount or % Designated to Beneficiary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Contingency Provision for Distribution of Estate
List below how assets will be distributed in the event above named individuals are not living or organizations are not in existence at the time your will is probated.

<table>
<thead>
<tr>
<th>Name of Beneficiary:</th>
<th>Relationship:</th>
<th>Address:</th>
<th>Amount or % Designated to Beneficiary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Home Alarm System
Provider: ____________________
Password: ____________________
Code Word: ____________________
Notes: ____________________

### Home Safe
Location: ____________________
Code or Key Location: ____________________
Notes: ____________________

### Mortgage
Provider: ____________________
Account Number: ____________________
Username: ____________________
Password: ____________________
Notes: ____________________

**NOTES**
One of the most important functions of this workbook is to serve as a place for developing a full and complete list of all your assets. This will help you in your estate planning and will also help your personal representative in the administration of your estate.

When you make your asset list, be sure to indicate how each asset is held and whether it has a beneficiary already named. This is particularly helpful for real property. The five basic types of property ownership are:

1. Individual ownership
2. Tenants in common (where your share of the asset will continue as part of your estate)
3. Joint tenants with right of survivorship (where the survivor will own the entire asset)
4. Tenants by the entirety (a special form of joint tenants — for married couples only)
5. Community property (if you live in a community property state)

When you complete your asset list on the following pages, try to make your best estimate as to the value of each asset. This will help in determining whether special provisions will be required in your estate plan or will.

### INVENTORY OF ASSETS

<table>
<thead>
<tr>
<th>Email Account</th>
<th>Social Networking Site</th>
<th>Amount or % Designated to Beneficiary:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website:</td>
<td>Website:</td>
<td></td>
</tr>
<tr>
<td>Username:</td>
<td>Username:</td>
<td></td>
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<tr>
<td>Password:</td>
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<td>Notes:</td>
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</tbody>
</table>

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<td>Password:</td>
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<tr>
<td>Notes:</td>
<td>Notes:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Blog Account</th>
<th>Social Networking Site</th>
<th>Amount or % Designated to Beneficiary:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website:</td>
<td>Website:</td>
<td></td>
</tr>
<tr>
<td>Username:</td>
<td>Username:</td>
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<td>Notes:</td>
<td>Notes:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Online Subscription</th>
<th>Social Networking Site</th>
<th>Amount or % Designated to Beneficiary:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website:</td>
<td>Website:</td>
<td></td>
</tr>
<tr>
<td>Username:</td>
<td>Username:</td>
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<td></td>
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<tr>
<td>Password:</td>
<td>Password:</td>
<td></td>
</tr>
<tr>
<td>Notes:</td>
<td>Notes:</td>
<td></td>
</tr>
</tbody>
</table>

### POWER OF ATTORNEY

<table>
<thead>
<tr>
<th>Name:</th>
<th>Phone Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td></td>
</tr>
<tr>
<td>Email Address:</td>
<td></td>
</tr>
</tbody>
</table>

### LAWYER

<table>
<thead>
<tr>
<th>Name:</th>
<th>Phone Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td></td>
</tr>
<tr>
<td>Email Address:</td>
<td></td>
</tr>
</tbody>
</table>

### ACCOUNTANT

<table>
<thead>
<tr>
<th>Name:</th>
<th>Phone Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td></td>
</tr>
<tr>
<td>Email Address:</td>
<td></td>
</tr>
</tbody>
</table>

### TAX INFORMATION & RETURNS

1. Copies of current tax information and recent returns can be found:
PROPERTY

Safe Deposit Boxes
Box #1 – Name and Address of Bank:

Box Number: ____________________________

Location of Key: ____________________________

Box held jointly with: ____________________________
Name: ____________________________
Address: ____________________________

Additional people who have access to the box:
Name: ____________________________
Address: ____________________________

Box #2 – Name and Address of Bank:

Box Number: ____________________________

Location of Key: ____________________________

Box held jointly with: ____________________________
Name: ____________________________
Address: ____________________________

Additional people who have access to the box:
Name: ____________________________
Address: ____________________________

Address: ____________________________

Stored Property
Name and Address of Storage Facility:

Box Number: ____________________________

Location of Key: ____________________________

Box held jointly with: ____________________________
Name: ____________________________
Address: ____________________________

Additional people who have access to the box:
Name: ____________________________
Address: ____________________________

Store Combination: ____________________________

Credit Cards
Company: ____________________________
Card Number: ____________________________
Online Username: ____________________________
Online Password: ____________________________

Company: ____________________________
Card Number: ____________________________
Online Username: ____________________________
Online Password: ____________________________

Company: ____________________________
Card Number: ____________________________
Online Username: ____________________________
Online Password: ____________________________

Company: ____________________________
Card Number: ____________________________
Online Username: ____________________________
Online Password: ____________________________

Gifts to Charities
Recipient: ____________________________
Amount: $__________________________

Gifts to Charities
Recipient: ____________________________
Amount: $__________________________

Gifts of percentages of whole estate or of remainder of estate
Recipient: ____________________________
Percentage: %

Recipient: ____________________________
Percentage: %

Recipient: ____________________________
Percentage: %

Recipient: ____________________________
Percentage: %

Care of pets: $__________________________

Other desires:
If your recipients or beneficiaries are under 18 or disabled, do you want their shares to be placed in trust and, if so, for how long or until what age?
For whom? ____________________________
Until when? ____________________________

OTHER IMPORTANT PASSWORDS

Home Computer
Username: ____________________________
Password: ____________________________
Notes: ____________________________

Home Computer
Username: ____________________________
Password: ____________________________
Notes: ____________________________

Home Computer
Username: ____________________________
Password: ____________________________
Notes: ____________________________

HOME COMPUTER

Username: ____________________________
Password: ____________________________
Notes: ____________________________

HOME COMPUTER

Username: ____________________________
Password: ____________________________
Notes: ____________________________

HOME COMPUTER

Username: ____________________________
Password: ____________________________
Notes: ____________________________

OTHER IMPORTANT PASSWORDS

Home Computer
Username: ____________________________
Password: ____________________________
Notes: ____________________________

Home Computer
Username: ____________________________
Password: ____________________________
Notes: ____________________________

OTHER IMPORTANT PASSWORDS

Home Computer
Username: ____________________________
Password: ____________________________
Notes: ____________________________

HOME COMPUTER

Username: ____________________________
Password: ____________________________
Notes: ____________________________

HOME COMPUTER

Username: ____________________________
Password: ____________________________
Notes: ____________________________

HOME COMPUTER

Username: ____________________________
Password: ____________________________
Notes: ____________________________
Owed on What Property?
Amount: $__________

Owed on What Property?
Amount: $__________

WHAT'S NEXT?

Once you have gathered your personal and family information, it is time to take the next step and actively turn that information into a sound estate plan.

Assess the documents you already have in place.

Do you have:

1. a will  □ Yes □ No
2. a trust  □ Yes □ No
3. a living trust □ Yes □ No
4. a durable power of attorney □ Yes □ No
5. a health care proxy □ Yes □ No
6. a living will □ Yes □ No
7. a prenuptial agreement □ Yes □ No
8. any community property □ Yes □ No
9. any previous reportable gifts □ Yes □ No
10. a separation agreement □ Yes □ No

Decide whether your current estate plan, if you have one, is satisfactory.

How would you like your estate distributed? (Be sure to designate any family heirlooms, jewelry, etc. Often the strongest disagreement among heirs arises from these items.)

CURRENT DESIRES FOR DISTRIBUTION OF PROPERTY

If married, at death of first spouse:
- All to surviving spouse
- Benefit surviving spouse and children
- Other desires (relatives, loved ones, charities, etc.)

If single, or at death of surviving spouse:

Gifts of specific items, heirlooms, etc.
Recipient: ___________________________  Property: ___________________________
Recipient: ___________________________  Property: ___________________________
Recipient: ___________________________  Property: ___________________________
Recipient: ___________________________  Property: ___________________________
Recipient: ___________________________  Property: ___________________________
Recipient: ___________________________  Property: ___________________________

Gifts of fixed amounts of money
Recipient: ___________________________  Amount: $__________
Recipient: ___________________________  Amount: $__________
Recipient: ___________________________  Amount: $__________
Recipient: ___________________________  Amount: $__________
Recipient: ___________________________  Amount: $__________
Recipient: ___________________________  Amount: $__________

BANKING INFORMATION

Checking Account(s)
Bank Name:
Address: ___________________________
Account Number: ___________________
Online Username: ___________________
Online Password: _________________
Name(s) on Account: _______________
Balance: ___________________________

Bank Name:
Address: ___________________________
Account Number: ___________________
Online Username: ___________________
Online Password: _________________
Name(s) on Account: _______________
Balance: ___________________________

Bank Name:
Address: ___________________________
Account Number: ___________________
Online Username: ___________________
Online Password: _________________
Name(s) on Account: _______________
Balance: ___________________________
Name(s) on Account: ____________________________
Address: ____________________________
Balance: ____________________________

Savings Account(s)
Bank Name: ____________________________
Address: ____________________________
Account Number: ____________________________
Online Username: ____________________________
Online Password: ____________________________
Name(s) on CD: ____________________________
Amount: ____________________________
Type: ____________________________
Maturity Date: ____________________________

Bank Name: ____________________________
Address: ____________________________
Account Number: ____________________________
Online Username: ____________________________
Online Password: ____________________________
Name(s) on Account: ____________________________

Balance: ____________________________

Bank Name: ____________________________
Address: ____________________________
Account Number: ____________________________
Online Username: ____________________________
Online Password: ____________________________
Name(s) on Account: ____________________________

Bank Name: ____________________________
Address: ____________________________
Account Number: ____________________________
Online Username: ____________________________
Online Password: ____________________________
Name(s) on Account: ____________________________

Balance: ____________________________

Certificates of Deposit(s)
Bank Name: ____________________________
Account Number: ____________________________
Online Username: ____________________________
Online Password: ____________________________

PERSONAL PROPERTY
List automobiles, boats, jewelry, firearms, household items, art, antiques, collections, or other items of value and their location.

Item: ____________________________
1 Location: ____________________________
Estimated Value: $ ____________________________

Item: ____________________________
1 Location: ____________________________
Estimated Value: $ ____________________________

Item: ____________________________
1 Location: ____________________________
Estimated Value: $ ____________________________

DEBTS
The following individuals owe me.

Current Bills
Owed on What Property?
Amount: $ ____________________________

Bank Loans
Owed on What Property?
Amount: $ ____________________________

Notes Payable
Owed on What Property?
Amount: $ ____________________________

LIABILITIES
### ANNUITIES

**Annuity 1 Issued by:**

Name(s) on Annuity:

Amount: $________

Type:

Maturity Date:

Bank Name:

Address:

Account Number:

Online Username:

Online Password:

**Location of Papers:**

---

**Annuity 2 Issued by:**

Name(s) on Annuity:

Amount: $________

Type:

Maturity Date:

Bank Name:

Address:

Account Number:

Online Username:

Online Password:

**Location of Papers:**

---

**Credit Union Account**

**Name of Credit Union:**

Name(s) on Account:

Amount:

Type:

Maturity Date:

Bank Name:

Address:

Account Number:

Online Username:

Online Password:

Name(s) on CD:

---

**REAL ESTATE**

**Type:**

Address:

Owner:

Type of Ownership:

Purchase Date:

Cost Basis: $________

Mortgage Balance: $________

Market Value: $________

**Type:**

Address:

Owner:

Type of Ownership:

Purchase Date:

Cost Basis: $________

Mortgage Balance: $________

Market Value: $________

**Type:**

Address:

Owner:

Type of Ownership:

Purchase Date:

Cost Basis: $________

Mortgage Balance: $________

Market Value: $________

---

**Type:**

Address:

Owner:

Type of Ownership:

Purchase Date:

Cost Basis: $________

Mortgage Balance: $________

Market Value: $________
<table>
<thead>
<tr>
<th>Individual Security Name:</th>
<th>Net Profit (before owner’s earnings &amp; taxes): $ ______________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type (stock, bond, mutual fund):</td>
<td>Projected Future Change: $ ______________</td>
</tr>
<tr>
<td>Owner:</td>
<td>Business Life Insurance Beneficiary:</td>
</tr>
<tr>
<td>Number of Shares:</td>
<td>Are any family members involved in business? Yes No</td>
</tr>
<tr>
<td>Original Cost:</td>
<td>If yes, list names.</td>
</tr>
<tr>
<td>Current Value: $</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bank Name:</th>
<th>Owner/Key Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>Name:</td>
</tr>
<tr>
<td>Account Number:</td>
<td>Age:</td>
</tr>
<tr>
<td>Online Username:</td>
<td>% Owned or # Shares:</td>
</tr>
<tr>
<td>Online Password:</td>
<td>Annual Income: $</td>
</tr>
<tr>
<td>Name(s) on Account:</td>
<td>Include in Buy/Sell? Yes No</td>
</tr>
<tr>
<td>Amount:</td>
<td></td>
</tr>
<tr>
<td>Individual Securities:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Individual Security Name:</th>
<th>Owner/Key Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type (stock, bond, mutual fund):</td>
<td>Name:</td>
</tr>
<tr>
<td>Owner:</td>
<td>Age:</td>
</tr>
<tr>
<td>Number of Shares:</td>
<td>% Owned or # Shares:</td>
</tr>
<tr>
<td>Original Cost:</td>
<td>Annual Income: $</td>
</tr>
<tr>
<td>Current Value: $</td>
<td>Include in Buy/Sell? Yes No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Individual Security Name:</th>
<th>Form of Business:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type (stock, bond, mutual fund):</td>
<td>Sole Proprietorship Partnership</td>
</tr>
<tr>
<td>Owner:</td>
<td>C Corporation S Corporation</td>
</tr>
<tr>
<td>Number of Shares:</td>
<td>Professional Corporation</td>
</tr>
<tr>
<td>Original Cost:</td>
<td>Personal Holding Company</td>
</tr>
<tr>
<td>Current Value: $</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Individual Security Name:</th>
<th>Buy/Sell Agreement:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type (stock, bond, mutual fund):</td>
<td>Yes No</td>
</tr>
<tr>
<td>Owner:</td>
<td>Describe (or attach copy):</td>
</tr>
<tr>
<td>Number of Shares:</td>
<td></td>
</tr>
<tr>
<td>Original Cost:</td>
<td></td>
</tr>
<tr>
<td>Current Value: $</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>At death, business is to be:</th>
<th>Owner/Key Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continued by Heirs</td>
<td>Name:</td>
</tr>
<tr>
<td>Liquidated</td>
<td>Age:</td>
</tr>
<tr>
<td>Sold to Surviving Owners</td>
<td>% Owned or # Shares:</td>
</tr>
<tr>
<td>Sold to Key Employees</td>
<td>Annual Income: $</td>
</tr>
<tr>
<td>Other:</td>
<td>Include in Buy/Sell? Yes No</td>
</tr>
</tbody>
</table>

Please describe any unique qualities of your business that you feel are pertinent to your estate design:
Individual Security Name:

Type (stock, bond, mutual fund):

Owner:

Number of Shares:

Original Cost: $

Current Value: $

College Savings Plan:

Type:

Provider:

Account Number:

Website:

Online Username:

Online Password:

Sub Account 1:

Sub Account 2:

Sub Account 3:

Sub Account 4:

Notes:

Individual Retirement Account

Account Number:

Owner:

Beneficiary:

Value: $

Institution Where Held:

Online Username:

Online Password:

401(k), 403(b) Plans

Account Number:

Owner:

Beneficiary:

Value: $

Institution Where Held:

Online Username:

Online Password:

Tax Deferred Annuity

Account Number:

Owner:

Beneficiary:

Value: $

Institution Where Held:

Online Username:

Online Password:

Qualified Pension, Keogh or Profit Sharing Plan

Account Number:

Owner:

Beneficiary:

Value: $

Institution Where Held:

Online Username:

Online Password:

Other Policies

(Boat, Trailer, Theft, Liability, Long-term Care, etc.)

Type:

Company:

Policy Number: ________________

Online Username: ________________

Online Password: ________________

Location of Policy:

Business Activity:

Have minority interest or lack of marketability discounts been considered in value?  □ Yes  □ No

BANK ACCOUNTS

Name of Business:

Location of Policy:

Automobile Insurance

Vehicle #1 (vehicle make and model):

Company:

Policy Number:

Online Username:

Online Password:

Location of Policy:

Policy Owned on Another Person

Name:

Company:

Policy Number:

Online Username:

Online Password:

Location of Records:

Loan Against an Insurance Policy

Company:

Amount: $

Location of Records:

Business Interest

Other Policies

Name of Business:

Business Activity:

(RETIREMENT PLANS/EMPLOYEE BENEFITS

Individual Security Name:

Type (stock, bond, mutual fund):

Owner:

Number of Shares:

Original Cost: $

Current Value: $

College Savings Plan:

Type:

Provider:

Account Number:

Website:

Online Username:

Online Password:

Sub Account 1:

Sub Account 2:

Sub Account 3:

Sub Account 4:

Notes:

Individual Retirement Account

Account Number:

Owner:

Beneficiary:

Value: $

Institution Where Held:

Online Username:

Online Password:

401(k), 403(b) Plans

Account Number:

Owner:

Beneficiary:

Value: $

Institution Where Held:

Online Username:

Online Password:

Tax Deferred Annuity

Account Number:

Owner:

Beneficiary:

Value: $

Institution Where Held:

Online Username:

Online Password:

Qualified Pension, Keogh or Profit Sharing Plan

Account Number:

Owner:

Beneficiary:

Value: $

Institution Where Held:

Online Username:

Online Password:
Split Dollar, Stock Option or Thrift Plans

Account Number: __________________________
Owner: __________________________
Beneficiary: __________________________
Value: __________________________
Institution Where Held: __________________________
Online Username: __________________________
Online Password: __________________________

Deferred Compensation Agreement

Account Number: __________________________
Owner: __________________________
Beneficiary: __________________________
Value: __________________________
Institution Where Held: __________________________
Online Username: __________________________
Online Password: __________________________

Describe any unique provisions:

Roth IRA

Account Number: __________________________
Owner: __________________________
Beneficiary: __________________________
Value: __________________________
Institution Where Held: __________________________
Online Username: __________________________
Online Password: __________________________

Insurance Policies

Account Number: __________________________
Owner: __________________________
Beneficiary: __________________________
Value: __________________________
Institution Where Held: __________________________
Online Username: __________________________
Online Password: __________________________

Disability Policies

Account Number: __________________________
Owner: __________________________
Beneficiary: __________________________
Value: __________________________
Institution Where Held: __________________________
Online Username: __________________________
Online Password: __________________________

Describe any unique provisions:

Company: __________________________
Name of Insured: __________________________
Owner: __________________________
Primary Beneficiary: __________________________
Contingent Beneficiary: __________________________
Policy Number: __________________________
Online Username: __________________________
Online Password: __________________________
Death Benefit: __________________________

MEDICAL INSURANCE

Long Term Care Insurance Policy

Owner: __________________________
Beneficiary: __________________________
Value: __________________________
Insurance Company Agent: __________________________

Hospitalization

Policy Number: __________________________
Online Username: __________________________
Online Password: __________________________
Carrier: __________________________

Surgical

Policy Number: __________________________
Online Username: __________________________
Online Password: __________________________
Carrier: __________________________

Major Medical

Policy Number: __________________________
Online Username: __________________________

Company: __________________________
Online Password: __________________________
Carrier: __________________________

Medicare Supplement

Policy Number: __________________________
Online Username: __________________________
Online Password: __________________________
Carrier: __________________________

Accident & Health

Policy Number: __________________________
Online Username: __________________________
Online Password: __________________________
Carrier: __________________________

HOMEOWNERS INSURANCE

Primary Residence

Property Address: __________________________

Location of Policy: __________________________

Company: __________________________
Policy Number: __________________________
Online Username: __________________________
Online Password: __________________________

Secondary Residence

Property Address: __________________________

Location of Policy: __________________________

Company: __________________________
Policy Number: __________________________
Online Username: __________________________
Online Password: __________________________

LIFE INSURANCE (Individual, Group, Mortgage)

Company: __________________________
Name of Insured: __________________________
Owner: __________________________
Primary Beneficiary: __________________________
Contingent Beneficiary: __________________________
Policy Number: __________________________
Online Username: __________________________
Online Password: __________________________
Death Benefit: __________________________