



Your Estate Planning Record

For everything there is a season,
And a time for every matter under heaven.

— Ecclesiastes 3:1

God is still speaking,
**UNITED CHURCH
OF CHRIST**



Your Estate Planning Record

Financial Development Ministry
United Church of Christ

Thank you for your support of the United Church of Christ through Our Church's Wider Mission. Your gifts have been instrumental in the production of this resource! Please see the insert on the inside back cover for suggested bequest language to benefit UCC entities.

Personal and Family Information

Date _____

Full Name _____ Maiden Name _____

Address _____

City _____ State _____ Zip _____ Telephone _____

E-mail _____ Fax _____

Date of Birth _____ Location of Birth Certificate _____

Social Security Number _____ Employer _____

Veteran? Yes No

Service Number _____ VA Number _____

Any Disability Yes No

Explain _____

Marital Status _____ Years Married _____

Name of Spouse/Partner _____

Address _____

Date of Birth _____ Social Security Number _____

Prior Marriages _____

Nearest Relatives:

List in order: (1) Children, (2) Grandchildren, (3) Brothers and/or Sisters, (4) Parents

| Full name | Relationship | Age | Address |
|-----------|--------------|-----|---------|
| | | | |
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An Inventory of your Estate

What do you have to Will?

1. Personal Property

A. Household furnishings and furniture, artworks, books, musical instruments, automobiles, jewelry, etc. List items for special consideration individually. Other items may be grouped.

| Item | If jointly held, with whom? | Value |
|--------------------------------|-----------------------------|-----------|
| | | |
| | | |
| | | |
| | | |
| | | |
| Total approximate value | | \$ |

B. Cash (checking accounts, savings accounts, CDs, etc.)

| Bank | Address | Value |
|-----------------------------|---------|-----------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| If jointly held, with whom? | | Total \$ |

C. Stocks, Bonds (government or other), **Mutual Funds**, etc.

| Company | Cost basis | Present value |
|-----------------------------|------------|-----------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| If jointly held, with whom? | | Total \$ |

D. Money held in mortgages, personal loans, etc.

| Item | Address | Amount |
|-----------------------------|---------|-----------------|
| | | |
| | | |
| | | |
| If jointly held, with whom? | | Total \$ |

E. IRAs

| Institution name | Amount | |
|-----------------------------|--------|-----------------|
| | | |
| | | |
| | | |
| If jointly held, with whom? | | Total \$ |

F. Pension Plans

| Institution name | Amount | |
|------------------|--------|-----------------|
| | | |
| | | |
| | | |
| | | Total \$ |

G. Deferred Compensation

| Institution name | Amount | |
|------------------|--------|-----------------|
| | | |
| | | |
| | | |
| | | Total \$ |

H. Annuities

| Institution name | Amount | |
|-----------------------------|--------|-----------------|
| | | |
| | | |
| | | |
| If jointly held, with whom? | | Total \$ |

2. Real Property (real estate, buildings, land, etc.)

| Description of Property | Location | Value |
|-----------------------------|----------|-----------------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| If jointly held, with whom? | | Total Approximate Value \$ |

3. Insurance (personal and group life policies, etc.)

If the beneficiary of any of your life insurance policies should precede you in death, leaving no other beneficiary, the insurance would be payable to your estate and therefore should be covered by your Will.

| Company | Type of policy | Beneficiary | Amount |
|---------|----------------|-------------|------------------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | Total Amount \$ |

4. Business Interests, Partnerships, etc.

| Type | Name | Value |
|-----------------------------|------|-----------------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| If jointly held, with whom? | | Total Approximate Value \$ |

| |
|-------------------------------|
| Total of all Assets \$ |
|-------------------------------|

5. Approximate Debts and Mortgages against your Estate

| To whom owed | Address | Amount |
|---------------------------|---------|-----------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total Indebtedness | | \$ |

Determine Net Estate Value

| | |
|---------------------------------|-----|
| Total Assets | \$ |
| Minus Total Indebtedness | -\$ |
| Net Estate Value | \$ |

Life Income Arrangements

Do you possess any of the following? If yes, describe.

Charitable Trusts Yes No

With whom? _____

Testamentary Trusts Yes No

With whom? _____

Charitable Gift Annuities Yes No

With whom? _____

Pooled funds Yes No

With whom? _____

Living Trusts Yes No

With whom? _____

Revocable Trusts Yes No

With whom? _____

Distribution of Your Estate

To whom do you want to leave your property?

You do not need to describe every item of your personal or real property in your Will. Only if there is some specific item or piece of land that you want to go to a certain individual do you list it. And if you wish to name a specific sum of money or percentage of your estate to a person or organization, state the amount or percentage and the name.

Specific Bequests:

| Person or organization | Address | Item, property or money |
|------------------------|---------|-------------------------|
| | | |
| | | |
| | | |

After the specific bequests, if any, the easiest way to divide the remainder of your estate is by percentages. Name the persons or organizations you wish to remember, then state what percent of the total remaining amount of your estate each is to receive.

| Person or organization | Address | Percentage |
|------------------------|---------|------------|
| | | |
| | | |
| | | |

Name Your Executor

An Executor is one who is appointed by you to carry out the terms of your Will. If you do not name an Executor in your Will, the court will appoint an administrator. He or she may not be the one you would have appointed, so exercise the right to name the person of your choice.

Executor

With bond

Without Bond

Name _____ Relationship _____

Address _____

Alternate Executor

With bond

Without Bond

Name _____ Relationship _____

Address _____

Corporate Executor

With bond

Without Bond

Name _____ Relationship _____

Address _____

Care for your children

Name their Guardian

If you have minor children, you should name a Guardian for them in your Will. This person will have charge of the children and the property you have willed to them. You can narrow this service by having a Guardian to only care for the children, and a separate Executor or Trustee for their estate. This Executor will hold the property and expend it as your Will directs.

Name of Guardian _____ Relationship _____

Address _____

Alternate Guardian _____ Relationship _____

Address _____

Name of Trustee _____ Relationship _____

Address _____

Alternate Trustee _____ Relationship _____

Address _____

My Professional Advisors

My Minister Name _____

Address _____

My Attorney Name _____

Address _____

My Insurance Agent Name _____

Address _____

My Accountant Name _____

Address _____

My Banker or Trust Officer Name _____

Address _____

My Stockbroker Name _____

Address _____

My tax records are located Address _____

My safe deposit box is located Address _____

My Will is located Address _____

Funeral Instructions

Arrangements to be made by (name of funeral home) _____

Telephone _____

Instruction for manner of burial or cremation _____

Cemetery _____

Address _____

Telephone _____

Type of funeral service I prefer _____

I direct that my body be used for these medical purposes: _____

Please suggest memorial gifts to the following:

Organization _____

Address _____

Organization _____

Address _____

Organization _____

Address _____

Organization _____

Address _____

Charitable Interests

Things you may wish to consider

You may wish to remember a number of religious or charitable interests as part of your estate planning process. Some of these might include:

UCC-related interests:

My congregation _____

My UCC conference (including camps and youth ministries) _____

UCC national ministries (see inside back cover insert for more specific details)

UCC seminaries _____

UCC health and human service agencies _____

UCC colleges and universities _____

Ecumenical church-related interests _____

Other charitable interests _____

For more information about including a gift to the church as part of your estate plan, contact:

Financial Development Ministry

United Church of Christ

700 Prospect Ave. E

Cleveland, OH 44115

Phone: (800) 846-6822

Fax: (216) 736-2297

E-mail: giving@ucc.org

Website: www.ucc.org/giving

To access a PDF of this booklet: www.ucc.org/estate

Additional hard copies \$1.50 each, Item # CD-850. Order from UCC Resources, 800-537-3394.

Notes

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The United Church of Christ.

No matter who you are, or where you are on life's journey, you're welcome here.