

Christian Wills Guide

4 EASY STEPS

to a

God-Honoring Money-Saving Will

Union Gospel Mission, Dallas

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

Congratulations! You're on your way to getting your financial "house" in order. And that's a great feeling, knowing that you have honored God, your family, and the ministries you love.

Before you visit a Christian estate planning attorney, fill in the blanks below as best as you can in each of the four sections. Your responses are completely confidential.

Doing this basic "homework" ahead of time will mean less billable time for the lawyer, and less cost for you. It also helps you prayerfully think things through at your own pace, so you can have confidence and peace about your decisions. If a question doesn't apply to you, just leave it blank.

If you're not sure about a question, don't worry about it - it's OK to leave it blank for now. Also, jot down any questions that come to mind as you fill in the blanks, and take them to your meeting with the attorney. When you are finished, simply print a copy for your attorney and for your records.

Step 1. Our Family

You

Full Name

Other names by which you have been known

Citizenship

Date of Birth

Social Security Number

Status Single Married Widowed
 Separated Divorced Re-Married

Existing Will? Yes No

If yes, what is the date of that Will?

Spouse (if applicable)

Full Name

Other names by which you have been known

Citizenship

Date of Birth

Social Security Number

Status

- Single Married Widowed
 Separated Divorced Re-Married

Existing Will?

- Yes No

If yes, what is the date of that Will?

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

• Child #1

Full Name

Relationship

Date of Birth

City/State

Special Needs?

- Yes No

If married, spouse's name

Any children born of this child's marriage

If yes, list names and ages

• Child #2

Full Name	<input type="text"/>
Relationship	<input type="text"/>
Date of Birth	<input type="text"/>
City/State	<input type="text"/>
Special Needs?	<input type="radio"/> Yes <input type="radio"/> No
If married, spouse's name	<input type="text"/>
Any children born of this child's marriage	<input type="text"/>
If yes, list names and ages	<input type="text"/>

• Child #3

Full Name	<input type="text"/>
Relationship	<input type="text"/>
Date of Birth	<input type="text"/>
City/State	<input type="text"/>
Special Needs?	<input type="radio"/> Yes <input type="radio"/> No
If married, spouse's name	<input type="text"/>
Any children born of this child's marriage	<input type="text"/>
If yes, list names and ages	<input type="text"/>

• Child #4

Full Name	<input type="text"/>
Relationship	<input type="text"/>
Date of Birth	<input type="text"/>
City/State	<input type="text"/>
Special Needs?	<input type="radio"/> Yes <input type="radio"/> No
If married, spouse's name	<input type="text"/>
Any children born of this child's marriage	<input type="text"/>
If yes, list names and ages	<input type="text"/>

• Child #5

Full Name	<input type="text"/>
Relationship	<input type="text"/>
Date of Birth	<input type="text"/>
City/State	<input type="text"/>
Special Needs?	<input type="radio"/> Yes <input type="radio"/> No
If married, spouse's name	<input type="text"/>
Any children born of this child's marriage	<input type="text"/>
If yes, list names and ages	<input type="text"/>

- More children

If you have more than 5 children, you can list their information here or attach a separate sheet of paper.

Step 2. The People We Trust

Guardianship

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

First choice

Contact information

Second choice

Contact information

Trustee

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

First choice

Contact information

Second choice

Contact information

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

Examples:

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

Other instructions?

Executor or Personal Representative

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

First choice

Contact information

Second choice

Contact information

Do you want to compensate your Executor or Personal Representative?

Yes

No

Power of Attorney

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

• **Financial/Business Matters**

First choice

Contact information

Second choice

Contact information

- Health Care Decisions

First choice

Contact information

Second choice

Contact information

- Special Instructions

Step 3. Our Money and Stuff

What You Own (Assets)

- Checking

Type of Account

Institution Address

Name(s) on account

\$ Value

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

- **Savings**

Type of Account

Institution Address

Name(s) on account

\$ Value

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

- **Certificates of Deposit**

Type of Account

Institution Address

Name(s) on account

\$ Value

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

- **Securities (Stocks, bonds, mortgages, notes, or trust deeds)**

Type of Account

Institution Address

Name(s) on account

\$ Value

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

• Annuities

Type of Account

Institution Address

Name(s) on account

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

• Retirement Accounts

Type of Account

Institution Address

Name(s) on account

\$ Value

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

- Other Assets (Business property, Limited Partnerships, Notes receivable, etc.)

Description

Owner

\$ Value

If you have more than one "Other Asset" - provide the description, owner, and \$ value here:

- Life Insurance

Life Insurance Company

Beneficiaries

\$ Face Value

If you have more than one Life Insurance policy, list the Life Insurance company, beneficiaries, and \$ face value here:

- Homes and Real Estate

Home/Real Estate Description

Address

Name(s) on Title

\$ Approximate Value

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

- **Vehicles (Automobile, RV, motorcycle, watercraft, etc.)**

Vehicle Description

Owner

\$ Value

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

- **Household Items (furnishings, antiques, jewelry, collectibles)**

Household Item Description

Owner

\$ Value

List other significant household items here - including description, owner, and \$ value.

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WHAT YOU OWE (LIABILITIES)

- Loans, mortgages, credit cards, and other debts

Description

--

\$ Amount

--

If you have more than one loan, mortgage, credit card, and other debts - provide the description and \$ amount here:

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Step 4. The People and Ministries We Want to Bless

Not only does a Will protect and provide for your family, it also communicates your values to them and your heart for the Lord's work.

For many Christians, a gift from their Will (called a "bequest") is the largest contribution they will ever make to ministry - impacting people for Christ for generations to come. The most common approaches for ministry bequests are:

- **Add Union Gospel Mission, Dallas to your family.** Some families treat ministry organizations like one additional child. For example, if a family has three children, they might add a fourth child named "Ministry" and divide the assets in their Will into four equal parts. Each of their children would receive 25%, and the remaining 25% would be divided among their favorite ministry organizations.
- **Tithe on your Estate.** Other families commit a 10% tithe of their estate to the ministry organizations they love, dividing the remaining 90% among their heirs.
- **Cap.** Others prayerfully decide on a "cap" for their children's inheritance, leaving the rest of their assets to advance the Lord's work here and around the world. This approach is used when the parents want to provide a modest gift to bless their children and eliminate concerns of creating dependence or giving too much too soon.

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

1

Name of Person or Charitable Organization

City/State

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

 %

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

2

Name of Person or Charitable Organization

City/State

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

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

3

Name of Person or Charitable Organization

City/State

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

 %

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

4

Name of Person or Charitable Organization

City/State

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

 %

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

5

Name of Person or Charitable Organization

City/State

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

 %

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

6

Name of Person or Charitable Organization

City/State

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

 %

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

7

Name of Person or Charitable Organization

City/State

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

 %

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



Name of Person or Charitable Organization

City/State

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

 %

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

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

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