

### Why Have A Will?

Your will is the foundation to your estate plan. It is a document that shares your last wishes and desires.

The laws of dying without a will mean the government has the right to determine control and distribution of resources, an executor, guardians and more.

A person who dies with a will retains the control and distribution of assets, bequeathing of personal property, the choice of an executor, the choice of guardians and more.

There are many people out there that don't have a will, in fact almost 60% of Americans don't have one. If we are truly going to be faithful stewards of what God has entrusted to us, a will needs to be implemented during our financial discipleship journey.

### ESTATE PLANNING WORKSHEET

(Complete before meeting with your estate attorney)

**Name:** \_\_\_\_\_ **Social Security No.:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone No.:** \_\_\_\_\_ **Email Address:** \_\_\_\_\_

**Name of Spouse:** \_\_\_\_\_ **Social Security No.:** \_\_\_\_\_

**Address:** \_\_\_\_\_

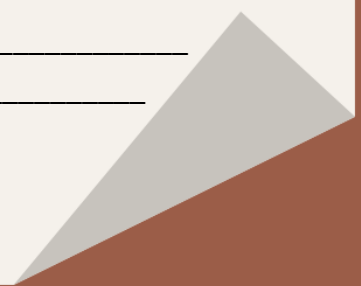
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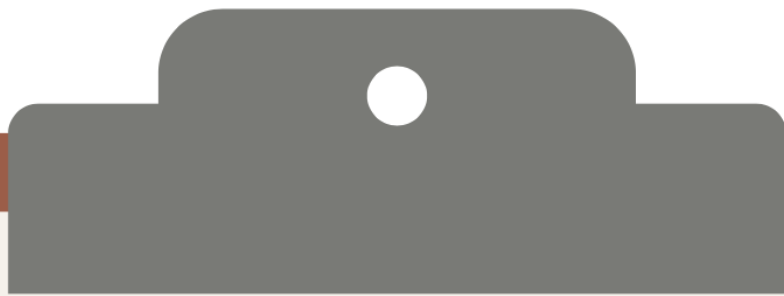
**Name of Executor/Personal Representative(s):** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone No.:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_





**Name of Guardian(s):** \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

**Successor of Guardian(s):** \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

**Name of Trustee(s):** \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

**Successor Trustee:** \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

**Children and Their Spouses**

1. Child's Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

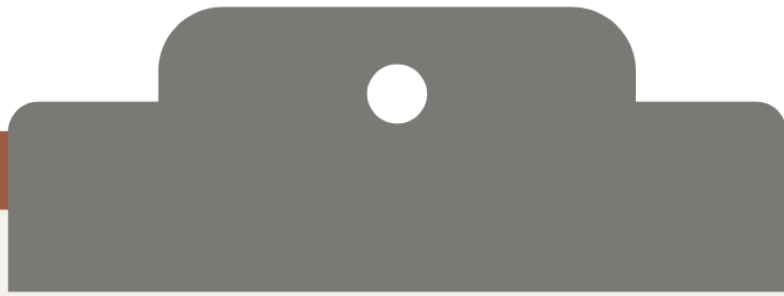
Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

Name of Spouse: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_





2. Child's Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

Name of Spouse: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

3. Child's Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

Name of Spouse: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

4. Child's Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

Name of Spouse: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

5. Child's Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

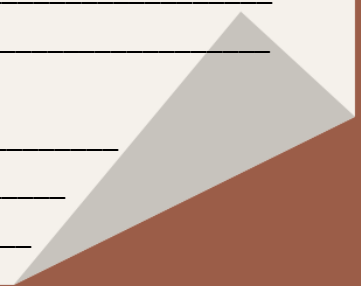
Address: \_\_\_\_\_

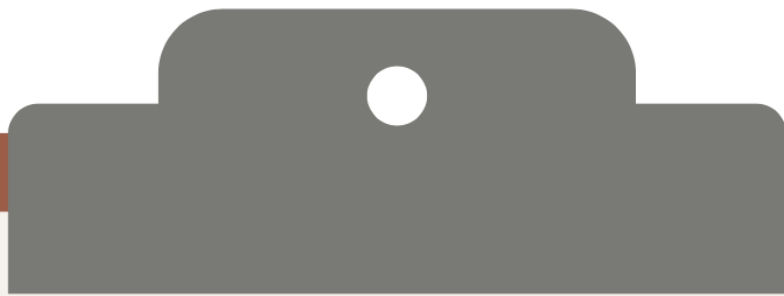
Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

Name of Spouse: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_





**Grandchildren**

1. Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

2. Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

3. Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

4. Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

5. Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

6. Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

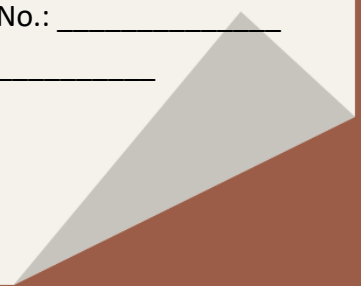
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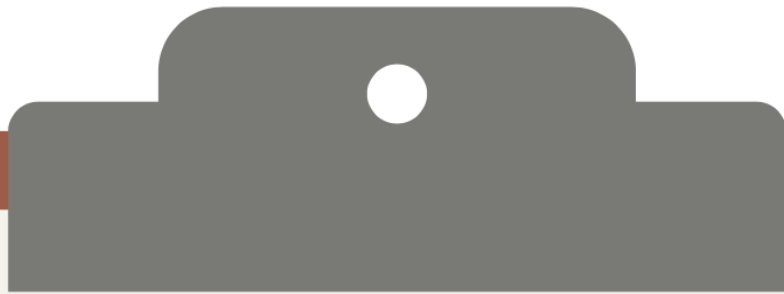
7. Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_

Email Address: \_\_\_\_\_





Attach your Financial Statement, Asset List, Investment List, and note how each asset is titled (in your name, your spouse's name, joint ownership, trust, corporation, or other forms of ownership).

**Distribution of the estate among the heirs (who, what, when & how)**

Heir: \_\_\_\_\_

What Receive:

\_\_\_\_\_

Describe When & How Receive:

\_\_\_\_\_

Heir: \_\_\_\_\_

What Receive:

\_\_\_\_\_

Describe When & How Receive:

\_\_\_\_\_

Heir: \_\_\_\_\_

What Receive:

\_\_\_\_\_

Describe When & How Receive:

\_\_\_\_\_

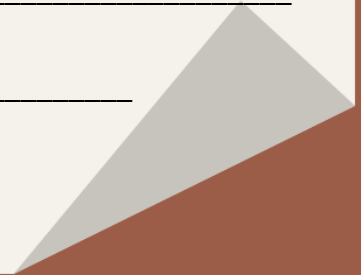
Heir: \_\_\_\_\_

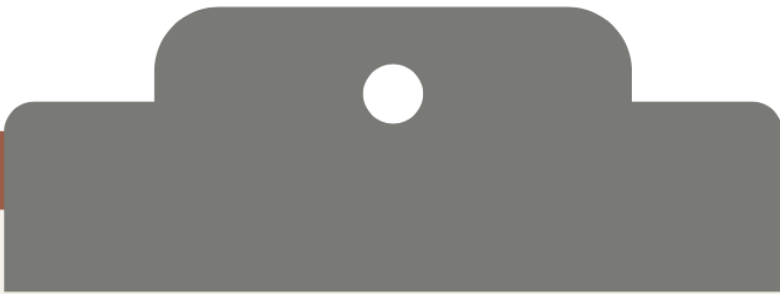
What Receive:

\_\_\_\_\_

Describe When & How Receive:

\_\_\_\_\_





Heir: \_\_\_\_\_

What Receive:

\_\_\_\_\_

Describe When & How Receive:

\_\_\_\_\_

Heir: \_\_\_\_\_

What Receive:

\_\_\_\_\_

Describe When & How Receive:

\_\_\_\_\_

Heir: \_\_\_\_\_

What Receive:

\_\_\_\_\_

Describe When & How Receive:

\_\_\_\_\_

Heir: \_\_\_\_\_

What Receive:

\_\_\_\_\_

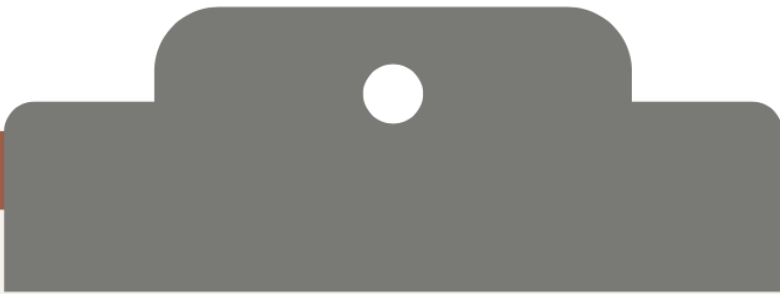
Describe When & How Receive:

\_\_\_\_\_

Special Provisions:

\_\_\_\_\_





### ESTATE DOCUMENT CHECKLIST

Date: \_\_\_\_\_

<b>Document</b>	<b>Person Covered by document</b>	<b>Document Needs Revision</b>	<b>Need, but don't have Document</b>
Will	_____	_____	_____
Will	_____	_____	_____
Trust	_____	_____	_____
Trust	_____	_____	_____
Medical Power of Attorney	_____	_____	_____
Medical Power of Attorney	_____	_____	_____
Living Will	_____	_____	_____
Living Will	_____	_____	_____
Durable Power of Attorney	_____	_____	_____
Durable Power of Attorney	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____

