Congregational Planned Giving Resource Sheets

Gathering the Necessary Paperwork

Do you have the legal documents necessary to ensure that your intentions are carried out after your lifetime? If so, it's time to get organized. The following estate planning documents and papers should be kept together to make taking care of your final affairs as simple and stress-free on your loved ones as possible.

Keep these documents in a safe place, such as a safe-deposit box—just make sure your family is aware of their location and where the key to your safe-deposit box is kept. Having these papers in one spot will ensure that your property is distributed how and to whom you wish.

Estate Planning

- A copy of your will or living trust
- Documents to help beneficiaries locate all assets passing to them, such as deeds of property, life insurance policies, where you have bank accounts and copies of account statements
- The names and addresses of:
  - Your executor and trustee
  - Your financial advisor
  - Your tax preparer
  - The individual you named as the attorney-in-fact in your power of attorney
  - The law firm that drafted your will or trust and the name of the specific attorney (Your original will can be kept at the firm.)
- Beneficiary designation forms for your retirement account, along with year-end statements and a listing of where you have accounts and what types.

Get organized today to make things easier for others in the future.

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Additional planned giving resources can be found at: www.uua.org/giving/plannedgifts/

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