

# Congregational Planned Giving Resource Sheets

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## Update Your Estate Plan in 3 Easy Steps

### Step 1: Make a list of all your major assets.

Compiling an inventory of everything you own helps you understand the variety of your assets: real estate, stocks, retirement plans, life insurance, bank accounts, certificates of deposit, art, antiques and jewelry. Some assets allow you to name a beneficiary to receive them directly upon your death. By doing this, you can make distributions to family or friends without the delay of probate.

### Step 2: Think of everyone you wish to benefit, including charities you would like to support.

If you are considering a gift to us, we can help you choose a method that maximizes your money and satisfies your wishes and our needs.

### Step 3: Enlist the help of an estate planning attorney.

Your will and estate plan are important because they benefit your family, friends and favorite charities after your lifetime. Maximize your options by seeking the help of an estate planning attorney who can ensure that your goals are accomplished and advise you of the implications of any contemplated moves.

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*181 words / Revised 11/09*

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Additional planned giving resources can be found at: [www.uua.org/giving/plannedgifts/](http://www.uua.org/giving/plannedgifts/)



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