

Congregational Planned Giving Resource Sheets

Close the Gaps in Your Estate Plan

Do you have a will? If you answered “yes,” then congratulations—you are ahead of the many people who do not. Now you are set for the rest of your life, right? Not necessarily. Preparing and signing a will is only the first step toward ensuring that your wishes are carried out after you are gone. Your estate plan should include:

- **A current will.**
- **A living will and a health care power of attorney.** These documents will protect you should you become unable to make medical decisions
- **A durable power of attorney.** This document will allow someone you appoint to act on your behalf, when necessary, for financial purposes.
- **Possibly a trust.**

Even if you have prepared and signed all these documents, it’s easy to overlook details that may result in your wishes not being fulfilled. Simple changes can be amended with a codicil, a legal instrument made to modify an earlier will, while significant alterations may require a newly created will.

Here are seven easy actions to take to make sure your estate plan is the best it can be:

1. Review your will every few years to make sure it is still current.
2. Consider leaving highly appreciated assets, such as stocks or real estate, to your heirs.
3. Decide if you’d like to avoid probate by putting assets into a revocable living trust.
4. Be especially careful in your decision-making if you and/or your spouse have children from a prior marriage.
5. Think carefully about distributions from your retirement plan, taking into account minimum distributions and withdrawal requirements.
6. Make sure your will is properly signed according to your state’s laws, and that the executor knows where documents are kept.
7. Finally, a difficult but essential step is to discuss your intentions with loved ones.

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UUA Office of Legacy Gifts

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



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