

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.

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.

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



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