

Congregational Planned Giving Resource Sheets

Planning Your Estate: Steps to Get Started

Want to protect your family by creating an estate plan, but not sure where to begin? Start by completing these two estate planning steps *before* meeting with your estate planning attorney. You'll be able to make important decisions on your own time, not when you're on the spot (and possibly paying by the hour).

Step 1: Inventory your assets and liabilities.

- List the approximate value, account number, location and contact information for all bank accounts, certificates of deposit, brokerage accounts, time-shares, mineral rights, retirement accounts, and oil and gas leases.
- Describe and identify other assets such as stock certificates, bonds, real estate, cars, boats and motor homes. State the location of the deeds or titles and the assets' approximate value.
- Indicate mortgages or loans, if any, and list the approximate amount of the debt and the name and address of the lienholder.
- Include a list describing household items, such as antiques, art, china, crystal, silverware and jewelry. Include each item's approximate value.
- Specify anything, even items of sentimental value, that you would like to leave to a particular person so you can include that provision in your estate plan.

Step 2: Identify your goals and priorities.

Ask yourself, "What is the most important goal my estate plan can accomplish?" Remember that a thorough plan can help you get more out of life today—not just carry out your last wishes. Consider these common objectives:

- Taking care of family
- Saving estate taxes and maximizing assets left to heirs
- Increasing current income from assets
- Supporting a favorite charitable cause
- Making provisions for medical care

Once you have completed these steps, your attorney can more easily assist you in creating an estate plan that best suits your needs. Schedule your meeting today to get your estate plans in shape.



UUA Office of Legacy Gifts

25 Beacon Street, Boston, MA 02108

(888) 792-5885 | (617) 948-6509 | giftplans@uua.org



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



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