

Congregational Planned Giving Resource Sheets

Estate Planning Toolbox

4 Must-Have Resources and Documents

Armed with these four basic resources and documents, you'll be well prepared to navigate life's inevitable twists and turns.

- 1. An attorney:** Investing in the services of an estate planning attorney will save you immeasurable heartache and expense later. This person's professional experience can prove invaluable as you make crucial decisions.
- 2. A will:** This document ensures that your wishes are carried out at your death—that your family, friends and favorite charities receive the consideration you intended.
- 3. A durable power of attorney:** If you should lapse into incompetence, this document provides another person with the legal right to make *financial* decisions on your behalf. Structured in many ways, this document is often used to ensure that your business, financial and other important affairs continue in your best interest.
- 4. A health care proxy:** This document names someone to make *health care* decisions on your behalf in the event you are incapacitated.

161 words / Revised 11/09

This copy is provided to you by the UUA Office of Legacy Gifts. Please feel free to use and modify it in your own publications to engage and educate members and friends about planned giving in your congregation.

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



UUA Office of Legacy Gifts

25 Beacon Street, Boston, MA 02108

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



©Unitarian Universalist Association and The Stelter Company

The information in this document is not intended as legal advice. For legal advice, please consult an attorney. Figures cited in examples are for hypothetical purposes only and are subject to change. References to estate and income tax include federal taxes only. Individual state taxes and/or state law may impact your results.