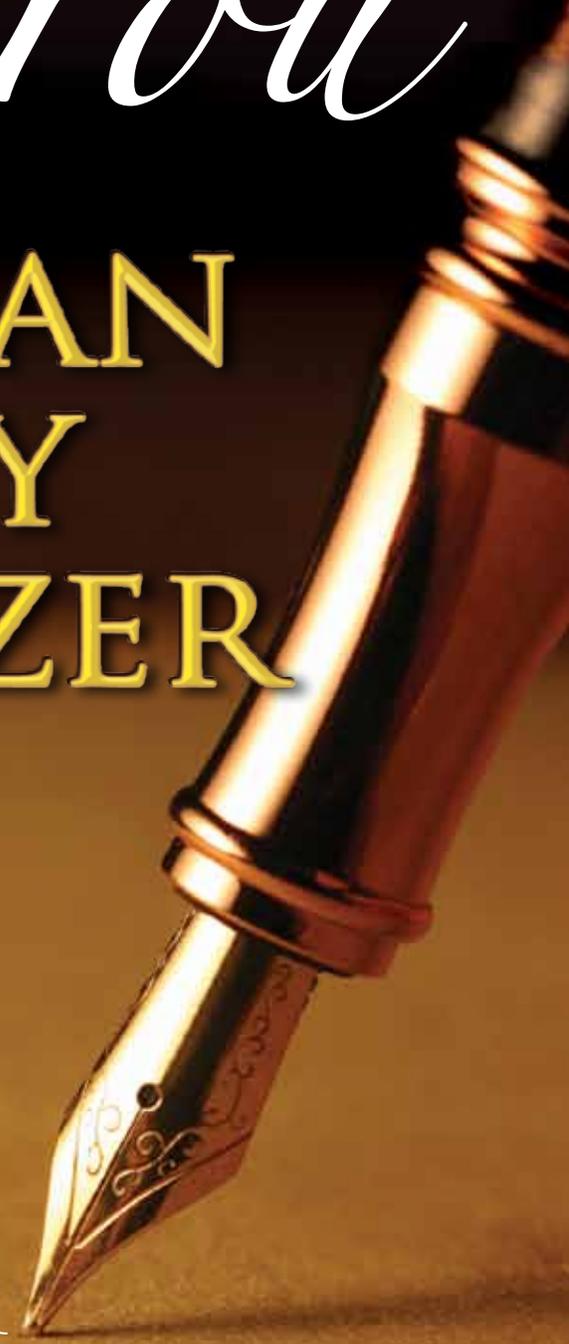


*Because
I Love You*

CHRISTIAN
LEGACY
ORGANIZER

Valuable Forms for
You, Your Spouse,
Loved Ones and
Aging Parents



A Special Message from the Author

Growing up, my father always told me,
“A short pencil is better than a long memory.”



Dear friend,

When it comes to living life and loving our families, there are so many things we need to remember. But it is truly impossible to remember everything we need to without having some helpful checklists or forms to remind us what is important to share with our spouse and family.

As a minister helping families that lost a loved one, I discovered that many spouses and family members seldom had all the information and instructions they needed to make important decisions and move forward. This lack of written information would lead to chaos, confusion, loss of cash, and family conflicts that would hurt family members deeply.

So, I set out to create for you and your loved ones the ultimate *LEGACY ORGANIZER* with the most comprehensive collection of helpful family forms available anywhere on the planet! The goal was to give you one source to record needed information that you could have in your home and/or share with loved ones so they would have the information and instructions they truly needed.

My prayer is that by using my father’s advice (“a short pencil”) and any of the pages in this *LEGACY ORGANIZER* will be a great help to you, your spouse, loved ones, and aging parents. My hope is that some of the forms and lists you find here will help you in your planning, finding, earning, spending, giving, living, dying, distributing, and praying! *Note: An electronic version is also available for those who prefer a keyboard to a pencil. Go to: www.MyFamilyForms.org*

I want you to know there are personal stories about real people connected to every page in this *LEGACY ORGANIZER*. As I was writing each form or list, I was always thinking of someone I knew that benefited from having this organized information or someone that struggled or suffered from not knowing these details. For help in inspiring you about the value of each page, you can hear or watch many of these personal stories by going to the audio and video clip files at www.MyFamilyForms.org.

I trust each and every page you choose to fill out will be a great help to you, your spouse, and your loved ones (and even future generations yet to come)!

Yours for loving our families,

A handwritten signature in black ink that reads "Brian". The signature is written in a cursive, slightly slanted style.

Dr. Brian Kluth

P.S. If you find any of the forms in the *LEGACY ORGANIZER* useful in your life, feel free to email me (organizer@kluth.org) a note or testimonial that I can share with others on the www.MyFamilyForms.org website.

LEGACY ORGANIZER

List of Forms & Pages

HOUSEHOLD & FAMILY MATTERS

| | |
|--|-----|
| Over 100 Family Questions | 1-4 |
| Family Tree | 5-7 |
| Special Days, Birthdays, Anniversaries | 8 |
| List of Advisors & Service Professionals | 9 |
| Seasonal Household To Do Checklist | 10 |
| Documents Checklist | 11 |
| Important Household Items | 12 |

FINANCIAL MATTERS

| | |
|---------------------------------------|----|
| List of Accounts | 13 |
| Income Sources | 14 |
| Lifestyle Expenses | 15 |
| Liabilities and Debts | 16 |
| Assets and Possessions | 17 |
| Christian and Charitable Giving | 18 |

RETIREMENT AND MEDICAL MATTERS

| | |
|---|----|
| List of Internet Resources for Retirees | 19 |
| Family Medical Information | 20 |
| Medical & End-of-this-Life Decisions | 21 |

END-OF-LIFE PLANNING MATTERS

| | |
|--|-------|
| Most Important Spiritual Decision | 22 |
| Personal Information and Funeral Plans (<i>Man</i>) (<i>Woman</i>) | 23-24 |
| Distribution of Special Personal Possessions | 25 |
| Equitable Distribution of Family Possessions | 26 |
| People and Groups to Notify About My Homegoing | 27 |
| 40+ Things to Do After a Loved One Dies | 28 |

ESTATE PLANNING MATTERS

| | |
|---|-------|
| Top 10 Estate Planning Mistakes..... | 29 |
| Top 5 Ways to Get Your House in Order | 30 |
| 9 Biblical Insights for End-of This Life Planning | 31-32 |
| Guardian Choices for Children | 33 |
| How to Conduct a Family Meeting | 34 |
| Estate Planning Tools for Effective Charitable Giving | 35-36 |

ADDITIONAL RESOURCES

| | |
|---|----|
| Additional Resources | 37 |
| Products and Resources by Dr. Brian Kluth | 38 |
| Ordering Information | 39 |
| Tips for Effectively Using the Legacy Organizer | 40 |

RECOMMENDATION:

In order for you and your loved ones to gain the greatest benefit from any of the forms and lists in this LEGACY ORGANIZER, it will probably be best to *set aside a specific 30-90 minute time period each week* to work on this over the coming months.

Also remember to write things in PENCIL, so you can easily erase and update information as things change.

NOTE: You also have the option of ordering an electronic Microsoft Word version and an Adobe PDF file so you can easily print, modify, or customize any of the forms and lists in the LEGACY ORGANIZER. See page 49 for ordering information or go to www.MyFamilyForms.org.



OVER 100 FAMILY QUESTIONS

Ask or answer these family history and legacy questions

What is a legacy? A legacy by definition is something you “hand down or pass along” to others. When it comes to end-of-this-life issues, many people focus on handing down money and possessions but miss out on handing down a legacy of their life to their children, grandchildren, and/or loved ones. The truth is the money will soon be spent or redirected, and the amount given will be forgotten. What will be remembered most is your living legacy of lessons learned, loving counsel, and laughter springing from past memories that you share in stories, writings, or recordings.

The Bible speaks about passing along life legacies and our spiritual heritage to our families:

- **Proverbs 13:22** A good man leaves an inheritance (legacy) for his children’s children.
- **Psalm 71:18** Even when I am old and gray, do not forsake me, O God, till I declare your power to the next generation, your might to all who are to come.
- **Psalm 78:2-4** I will open my mouth in parables, I will utter hidden things, things from of old—what we have heard and known, what our fathers have told us. We will not hide them from their children; we will tell the next generation the praiseworthy deeds of the LORD, his power, and the wonders he has done.

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

What was a favorite school subject, school memory, or year/grade in school? Favorite teacher? Why?

How did you get to school (walk, bus, parents drive you, car pool, or...)? How far was it?

Were you ever in band, choir, club, school play or drama production, student council, sports team, etc.?

What type of grades did you have in grade school? Why? Jr. High or Middle school? High school? College?

If you played sports, what sport and position did you play? Did you ever score/win? Were you ever hurt?
What were some of the biggest highlights and memories you have from being on this team?

Did you ever go to school dances or proms?

Was there ever a big tragedy among your immediate family, relatives, or friends?

Were you ev

Special or si

Did you ever

What do you
in your neig

What were c
school, bein

Awards, trop

What about

First crush?

Most funny,

Names (and

What were y

Did you hav
Were you ev

What was th

The three pe

Lessons learn

Places you've traveled? Most exciting or fun things you've ever done?



PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (*files sent by email*)
- **Printed Version - \$2.75 to \$29.95** (*mailed to your home or workplace*)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

mer



Were you in any clubs, fraternities/sororities, civic groups, associations, non-profit boards, or government groups? Did you hold any leadership positions? Were you ever elected to a special office?

What was some of the best advice you ever received? Who gave it to you?

What are some of the most important lessons you learned about cars?

How or when you met your spouse? Why were you attracted to them? Details about your dating, courtship, engagement, wedding day, honeymoon, and early years before children? How did you know this was the person God had for you? Did you almost marry someone else—and if yes, what happened?

Marriage - How are you different from each other? How do these differences complement and strengthen you as people, as a couple, and as parents?

Favorite mem

Did you ever i

Lessons you le
record keepin

Lessons you le

Names of you
along with yo

Special attrib
really proud o

What do you i

Specific wishe

Favorite aunt

What are som

Jobs, vocation

What was the

What were th

If you were in
learn, and ho

What are some family stories from your personal life or family.

Most meaningful successes or things you have been proud of in life?

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (*files sent by email*)
- **Printed Version - \$2.75 to \$29.95** (*mailed to your home or workplace*)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

dit,

ou get

were



Favorite jokes and stories? Favorite recipes, meals, and desserts? Favorite pets? Favorite toys? Favorite vacation(s) or trip(s)? Favorite house? Favorite place you lived? Favorite movie(s)? Favorite bands/singers?

Encounters you have had with any famous people?

What were the major life changing events in your life?

Instruments played? If you can, record your playing.

Stories and facts you know about your parents, grandparents, aunts, uncles, cousins, or siblings?

Where were your parents or grandparents born/raised? What did they do for a living? What do you most remember about them? What was their spiritual background/heritage? What stories do you recall about them? Where are they buried (if known, provide name of town/city, cemetery, address, row #, lot #, block #, section #)?

Where (cities)

Lessons have

Favorite hob

Greatest tra

YOUR SPIRIT

Circumstanc

When were y

In what way

Spiritual gift

Stories of Go

People that

Things you l

Favorite Bibl

How and wh

Are you assu

Other:

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (*files sent by email*)
- **Printed Version - \$2.75 to \$29.95** (*mailed to your home or workplace*)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383



SPECIAL NOTE ABOUT PHOTOS: Take one evening a month and go through your family photos and write the approximate date, place, names, and connections (i.e. cousin, aunt/uncle, grandparents, etc.) of other people that may be in the photo.

COUPLE'S FAMILY TREE

Record the person's name and then add any of the following information:

- **B** (Date of birth/location)
- **W** (Wedding date/location)
- **S** (Spouse's first name/maiden name)
- **L** (Current location: city/town)
- **O** (Primary occupation/s)
- **D** (Date of death)
- **C** (Cemetery location)
- **A** (Adopted)
- **H** (Half-sibling)
- **SS** (Step-sibling)

| | |
|----------------------|--|
| CHILD 1: | |
| | |
| Grandchild | |
| Great Grandchildren: | |
| Grandchild | |
| Great Grandchildren: | |
| Grandchild | |
| Great Grandchildren: | |
| Grandchild | |
| Great Grandchildren: | |
| CHILD 2: | |
| | |
| Grandchild | |
| Great Grandchildren: | |
| Grandchild | |
| Great Grandchildren: | |
| Grandchild | |
| Great Grandchildren: | |
| CHILD 3: | |
| | |
| Grandchild | |
| Great Grandchildren: | |
| Grandchild | |
| Great Grandchildren: | |
| Grandchild | |
| Great Grandchildren: | |
| CHILD 4: | |
| | |
| Grandchild | |
| Great Grandchildren: | |
| Grandchild | |
| Great Grandchildren: | |
| Grandchild | |
| Great Grandchildren: | |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

Suggestion: If your family is larger than the spaces allowed on this form, make a photocopy of this sheet to record additional people.

MAN'S FAMILY TREE

Record the people's names and then add any of the following information:

- **B** (Date of birth/location)
- **W** (Wedding date/location)
- **S** (Spouse's first name/maiden name)
- **L** (Current location: city/town)
- **O** (Primary occupation/s)
- **D** (Date of death)
- **C** (Cemetery location)
- **A** (Adopted)
- **H** (Half-sibling)
- **SS** (Step-sibling)

| | |
|----------------------------|--|
| FATHER: | |
| Father's Father: | |
| Father's Mother: | |
| Father's Sibling 1/Spouse: | |
| Children: | |
| Father's Sibling 2/Spouse: | |
| Child: | |
| Father's Sibling: | |
| Child: | |
| MOTHER: | |
| Mother's Father: | |
| Mother's Mother: | |
| Mother's Sibling: | |
| Child: | |
| Mother's Sibling: | |
| Child: | |
| Mother's Sibling: | |
| Child: | |
| SIBLING 1 | |
| Child 1: | |
| Child: | |
| Child 3: | |
| Child: | |
| SIBLING 2 | |
| Child 1: | |
| Child: | |
| Child 3: | |
| Child: | |
| SIBLING 3 | |
| Child 1: | |
| Child: | |
| Child 3: | |
| Children: | |
| Children: | |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

Suggestion: If your family is larger than the spaces allowed on this form, make a photocopy of this sheet to record additional people.

WOMAN'S FAMILY TREE

Record the people's names and then add any of the following information:

- **B** (Date of birth/location)
- **W** (Wedding date/location)
- **S** (Spouse's first name/maiden name)
- **L** (Current location: city/town)
- **O** (Primary occupation/s)
- **D** (Date of death)
- **C** (Cemetery location)
- **A** (Adopted)
- **H** (Half-sibling)
- **SS** (Step-sibling)

| | |
|----------------------------|-----------|
| FATHER: | |
| Father's Father: | |
| Father's Mother: | |
| Father's Sibling 1/Spouse: | |
| Children: | |
| Father's Sibling 2/Spouse: | |
| Child | |
| Father's Sibling | |
| Child | |
| MOTHER: | |
| Mother's Father | |
| Mother's Mother | |
| Mother's Sibling | |
| Child | |
| Mother's Sibling | |
| Child | |
| Mother's Sibling | |
| Child | |
| SIBLING 1 | |
| Child 1: | |
| Child | |
| Child 3 | |
| Child | |
| SIBLING 2 | |
| Child 1: | |
| Child | |
| Child 3 | |
| Child | |
| SIBLING 3 | |
| Child 1: | |
| Child | |
| Child 3 | |
| Children: | Children: |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

SPECIAL DAYS, BIRTHDAYS & ANNIVERSARIES OF FAMILY, RELATIVES & FRIENDS

To find out the dates for all national holidays and celebration days, go to: www.holidaysmart.com

B= Birthdate **A=** Anniversary **D=** Death **E=** Engagement

JANUARY

FEBRUARY

MARCH

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

LIST OF ADVISORS & SERVICE PROFESSIONALS

This form is important for your spouse and loved ones to have readily available when you travel or are gone.

| | Name, Company, Phone Numbers, Address or E-mail |
|------------------------|---|
| Accountant | |
| Appliance repair | |
| Attorney | |
| Auto Insurance | |
| Baby sitter | |
| Banker | |
| Car Dealer | |
| Car Mechanic | |
| Charitable | |
| Clergy | |
| Computer | |
| Contractor | |
| Dentist | |
| Doctor for | |
| Doctor for | |
| Doctor for | |
| Electrician | |
| Employee | |
| Estate Executor | |
| Exterminator | |
| Financial | |
| Handyman | |
| Heating & Cooling | |
| Home Insurance | |
| Home Warranty | |
| Hospital | |
| Interior Designer | |
| Landscaper | |
| Lawn Care | |
| Life Insurance | |
| Med. Insurance | |
| Med. Power of Attorney | |
| Medical Care | |
| Pension Fund | |
| Pharmacy | |
| Plumbing | |
| Power of Attorney | |
| Snow Removal | |
| Tax Preparation | |
| Veterinarian | |
| Other: | |
| Other: | |
| Other: | |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (*files sent by email*)
- **Printed Version - \$2.75 to \$29.95** (*mailed to your home or workplace*)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org
Toll-free 866.935.5884 Phone: 719.302.3383

SEASONAL HOUSEHOLD TO DO CHECKLIST

Use this form prior to the start of each season (spring, summer, fall, winter) to help you and your spouse determine things you will do in the coming season. If you save each of the forms you fill out, this will help your spouse and loved ones know what needs to be done each season if you are gone or unable to help.

| FAMILY EVENTS | CHILDREN | | |
|---|--|--|--|
| Plan, schedule, invite, decorate, purchase gifts, food, planning, shopping, get tickets, etc. | <input type="checkbox"/> Sports | <input type="checkbox"/> Hose/sprinkler system | <input type="checkbox"/> Interior/exterior painting |
| <input type="checkbox"/> Birthdays | <input type="checkbox"/> Music | <input type="checkbox"/> Outdoor furniture | <input type="checkbox"/> Fences/gates |
| <input type="checkbox"/> Graduations | <input type="checkbox"/> Extracurricular activities/dubs | <input type="checkbox"/> Pantry – clean out old food | <input type="checkbox"/> Sports equipment |
| <input type="checkbox"/> Weddings | <input type="checkbox"/> Camps/Retreats | <input type="checkbox"/> Tighten cabinet knobs | <input type="checkbox"/> Pool maintenance |
| <input type="checkbox"/> Anniversa | <input type="checkbox"/> Lessons/Classes | <input type="checkbox"/> Oil hinges/locks/springs | <input type="checkbox"/> Phones/long distance service |
| <input type="checkbox"/> Mother's | <input type="checkbox"/> | <input type="checkbox"/> Thermostat/settings | <input type="checkbox"/> Computers/networks |
| <input type="checkbox"/> Memoria | | <input type="checkbox"/> Planting/gardening | <input type="checkbox"/> Electronics/TV/Cable/Internet |
| <input type="checkbox"/> Sports ev | | | <input type="checkbox"/> s (discard or g) |
| <input type="checkbox"/> Family re | | | ENGINES |
| <input type="checkbox"/> Independ | | | te-up |
| <input type="checkbox"/> Vacation | | | enance |
| <input type="checkbox"/> Labor day | | | |
| <input type="checkbox"/> Thanksgi | | | |
| <input type="checkbox"/> Christma | | | |
| <input type="checkbox"/> Hunting/ | | | |
| <input type="checkbox"/> New Year | | | |
| <input type="checkbox"/> Super Bo | | | |
| <input type="checkbox"/> Coming t | | | |
| <input type="checkbox"/> Date nigh | | | |
| <input type="checkbox"/> | | | |
| SPI | | | |
| <input type="checkbox"/> Daily Bibl | | | |
| <input type="checkbox"/> Way(s) I v | | | |
| <input type="checkbox"/> Special p | | | |
| <input type="checkbox"/> Fellowshi | | | |
| <input type="checkbox"/> Bible stud | | | |
| <input type="checkbox"/> Camp/co | | | |
| <input type="checkbox"/> Fasting | | | |
| <input type="checkbox"/> Outreach | | | |
| <input type="checkbox"/> Missions | | | |
| <input type="checkbox"/> Books to | | | |
| <input type="checkbox"/> Pastor Ap | | | |
| <input type="checkbox"/> Scripture | | | |
| <input type="checkbox"/> | <input type="checkbox"/> Gutters/downspouts | <input type="checkbox"/> Medical/safety supplies | <input type="checkbox"/> |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org
Toll-free 866.935.5884 Phone: 719.302.3383

DOCUMENTS CHECKLIST

Gather your official, financial, and legal documents and let your spouse, key family member(s), personal representative, or executor know where they are located for easy access/retrieval.

| Documents | Physical Location of Originals <i>(and/or name of hard drive location of computer file)</i> | Location of copies <i>(if applicable) or names of people who have copies with date given</i> |
|---|--|---|
| 5 Wishes Document <i>(if applicable)</i> www.agingwithdignity.org <i>(See page 30)</i> | | |
| This "Legacy Organizer" manual | | |
| Automobile Titles | | |
| Birth Certificates or Adoption papers | | |
| Business Agreements | | |
| Business or | | |
| Citizenship | | |
| Death Cert | | |
| Debt/Loan | | |
| Deeds | | |
| Disability I | | |
| Divorce/Se | | |
| Employee I | | |
| Financial a | | |
| Financial/B | | |
| Funeral ins | | |
| Home & Ve | | |
| Leases | | |
| Life Insur | | |
| Marriage C | | |
| Medical Po | | |
| Memos/Ins | | |
| of personal | | |
| possession | | |
| Military Dis | | |
| Mortgages | | |
| Partnership | | |
| Passports | | |
| Past Incom | | |
| Personal ac | | |
| Personal Fi | | |
| Power of At | | |
| Pre-paid fu | | |
| Recreation | | |
| Retirement | | |
| Social Secu | | |
| Stock Certi | | |
| Wills/Trust | | |
| Other: | | |
| Other: | | |
| Safe Depos | | |
| Location of | | |
| Name of Fir | | |
| Address: _____ | | |
| _____ | | |
| _____ | | |
| _____ | | |
| _____ | | |
| _____ | | |
| _____ | | |
| _____ | | |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** *(files sent by email)*
- **Printed Version - \$2.75 to \$29.95** *(mailed to your home or workplace)*
- **Printed Version with Customized Covers (4 pages) - \$1/copy** *for 500 or more*
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org
Toll-free 866.935.5884 Phone: 719.302.3383

*Note about Social Security Benefits. The SS phone number is 1-800-772-1213. To claim SS death benefits after the death of a spouse, go to your local Social Security office and bring with you your spouse's death certificate, social security card, birth certificate, marriage certificate/license, and the birth certificates for each child.

IMPORTANT HOUSEHOLD ITEMS

This form is important for your spouse and loved ones to have readily available when you travel or are gone.

LOCATION OF IMPORTANT HOUSEHOLD ITEMS:

- Main water turn off valve:
- Hose and/or sprinkler system turn off valve:
- Gas turn off valve:
- Phone line junction box on the exterior of the house:
- Electric circuit breakers/fuse box:
- TV satellite or cable box:
- Cans of paint used in interior or exterior:
- Family photos:
- Address book:
- Owner instruction manuals for appliances/etc:
- Passbooks for checkbook/saving accounts:
- Cash/gold/silver/coins/precious gems:
- Firearms:
- Inventory of
- Other:
- Other:

LOC

- Alarm/Secu
- Vehicles:
- Exterior ho
- Garage:
- Cabin/vacat
- Lawn mowe
- Boat:
- RV or trailer
- Gun cabine
- Boat house:
- Storage she
- Location of
- Location of
- Electronic e
- Bicycle lock
- Television s
- Combinatio
- Combinatio
- Combinatio
- Other:
- Other:

- Location of
- Security coc
- Location of
- Location of
- Location of
- Computer #
- Computer #
- Computer #
- Email addre
- Email addre
- Email addre
- Email address:
- Other:
- Other:

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (*files sent by email*)
- **Printed Version - \$2.75 to \$29.95** (*mailed to your home or workplace*)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

Login:

Password:

LIST OF ACCOUNTS

To view filled out samples, go to: www.MyFamilyForms.org

Provide important and confidential information for the following types of accounts:

- **CK** (Checking Account)
- **SV** (Savings Account)
- **RF** (Retirement/Pension Fund)
- **ST** (Stocks)
- **BD** (Bonds)
- **CC** (Credit Card)
- **INV** (Investment)
- **MO** (Mortgage)
- **VP** (Vehicle Payment)
- **LO** (Loans & Payments)
- **ATM** (ATM Card/Pin #)
- **WS** (Website Account)
- **EM** (Email Account)
- **ON** (Online shopping accounts—E-bay, Paypal, etc.)
- **INS** (Insurance—Life, Medical, House, Vehicle, Disability, etc.)
- **CHR** (Charitable Giving Account)
- **FF** (Frequent Flyer Account)

NOTE: Treat this info with the **UTMOST CONFIDENCE**. Only give to a spouse and/or individuals involved in your finances and estate.

| Company Account | \$ Value & Date: |
|---|---------------------|
| <h2>PREVIEW PAGE</h2> <p>The Legacy Organizer can be purchased in the following formats to best serve your needs:</p> <ul style="list-style-type: none">• Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95 (files sent by email)• Printed Version - \$2.75 to \$29.95 (mailed to your home or workplace)• Printed Version with Customized Covers (4 pages) - \$1/copy for 500 or more• Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999• Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details• Non-Religious Version Available – Go to www.MyFamilyForms.org for details <p style="text-align: center;">www.MyFamilyForms.org Toll-free 866.935.5884 Phone: 719.302.3383</p> | |

To research if your family has any unclaimed money sitting in insurance companies, banks, utility companies, stocks, etc., go to: www.missingmoney.com

INCOME SOURCES

"Honor the Lord by giving him the first part of all your income." Proverbs 3:9

"Everything comes from you, (Oh LORD) and we have given you only what comes from your hand." 1 Chronicles 29:14-15

This form will help you and your spouse understand your annual income sources. It will also help you assess how much you may want to give from your various income sources if you want to be more faithful and generous in your Christian and charitable giving.

| <input checked="" type="checkbox"/> | Normal Cash & Income Over 12 Months | Amount: | Freq: | ___ % = |
|-------------------------------------|-------------------------------------|---------|-------|---------|
| <input type="checkbox"/> | Income, wage or salary from: | | | |
| <input type="checkbox"/> | Income, wage or salary from: | | | |
| <input type="checkbox"/> | Income, wage or salary from: | | | |

Step 1

Check any source of cash flow or income you normally receive over a 12 month

Step 2

Determine an approximate "value" (\$ amount) of this item represented in your life. Indicate the frequency of how often you receive these funds:

- W (Weekly)
- B (Bi-weekly 2x a month)
- M (Monthly)
- Q (Quarterly)
- Y (Yearly/annual)
- S (Sporadic)
- O (One-time)

Step 3

Indicate the percentage (%) you have decided you will normally give to the Lord from your God-given resources that has provided for

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions - Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available - Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

| | |
|--------------------------|--------------------------------|
| <input type="checkbox"/> | Babysitting, lawn mowing, etc. |
| <input type="checkbox"/> | Other: |

LIABILITIES & DEBTS

"The borrower is servant to the lender." Proverbs 22:7

"The wicked borrow and do not repay, but the righteous give generously." Psalms 37:21

"Pay all your debts except the debt of love for others - never finish paying that!" Romans 13:8

There are Christian classes and counselors nationwide available to help you get out of debt:

www.Crown.org • www.DaveRamsey.com • www.goodsenseministry.com

www.cheapkatemonthly.com has a great online get-out-of-debt calculator (RPDP = Rapid Debt Repayment Plan)

| Today's Date: ___/___/20__ | Lender | Account # | Phone # | Total Balance | Minimum Payment | % Rate |
|-------------------------------|-----------------|---------------------|--------------|---------------|-----------------|--------|
| Sample | First Bank VISA | 3456-7891-0123-4567 | 303-555-1234 | \$3211 | \$125 | 18% |
| Mortgage 1 | | | | | | |
| Mortgage 2 | | | | | | |
| Home Equit | | | | | | |
| Car loan | | | | | | |
| Car loan | | | | | | |
| Furn/Applia | | | | | | |
| Furn/Applia | | | | | | |
| Rec Equip/V | | | | | | |
| Rec Equip/V | | | | | | |
| Electronics | | | | | | |
| Electronics | | | | | | |
| Credit Card | | | | | | |
| Credit Card | | | | | | |
| Credit Card | | | | | | |
| Credit Card | | | | | | |
| Credit Card | | | | | | |
| Medical 1 | | | | | | |
| Medical 2 | | | | | | |
| Medical 3 | | | | | | |
| Medical 4 | | | | | | |
| Medical 5 | | | | | | |
| Medical 6 | | | | | | |
| Student Loa | | | | | | |
| Student Loa | | | | | | |
| Personal Lo | | | | | | |
| Personal Lo | | | | | | |
| Business Lo | | | | | | |
| Business Lo | | | | | | |
| IRS/Taxes | | | | | | |
| Other | | | | | | |
| Other | | | | | | |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org
Toll-free 866.935.5884 Phone: 719.302.3383

ASSETS & POSSESSIONS

Periodically, it is wise to prayerfully consider what God has entrusted to you:

1. Determine the items (and the market or resale value) you have in your possession.
2. Prayerfully and honestly determine which of these items you need and are actually using?
3. Are there any items that could be passed along to someone you know who could benefit from their use?
4. Are there any items that should be sold?
5. Are there any items (in the near future or after your funeral) that could be given to benefit your church, a Christian ministry, or charity?

Visit www.idonate.com if you want to donate some of these assets to a church, charity or Christian organization.

IMPORTANT NOTE: It is wise to discuss with your charity, church, or ministry the best way to give an asset. Depending on the value and type of asset, it may be wise to have the organization assist you in obtaining the help of an experienced estate planning professional to determine how to most effectively and affordably “transfer” an asset. Careful planning with experienced professional counsel versed in evaluating tax and estate planning issues will maximize the value of this gift to a non-profit, to yourself and to your family.

“From what you have, take an offering for the LORD. Everyone who is willing is to bring to the LORD.” Ex 35:4-5

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

HELPFUL INTERNET RESOURCES FOR RETIREES, AGING ADULTS AND CAREGIVERS

- **Because I Love You LEGACY ORGANIZER** www.MyFamilyForms.org 40 pages of valuable resources, checklists and forms for spiritual matters, finances, household information, documents, family tree, life legacy, funeral plans, wealth sharing/distribution, aging parents, child guardians, estate planning and more!
- **Christian Retirees with RVs - Volunteer Service Opportunities** www.workersonwheels.com
www.mmap.org www.sowerministry.org www.rvics.com www.habitat.org/gv/rv.html
- **Christian Volunteer Opportunities for Retirees** www.servantopportunities.net www.finishers.org
- **5 Wishes Booklet** www.agingwithdignity.org A valuable "fill-in-the-blank" document to communicate your near-the-end-of-this-life medical, personal, emotional and spiritual wishes for family and medical staff/professionals.
- **American Association of Retired Persons** www.aarp.org
- **Administration on Aging** www.aoa.gov

- **Soluti**
checkl
- **Aging**
Excell
- **Alzhe**
- **Assist**
an ass
anywh
- **Benef**
local a
care a
- **Careg**
- **Cente**
- **Cente**
educa
- **Child**
caregi
- **Christ**
- **Drugs**
- **Elder**
- **Famil**
- **Focus**
- **Gover**
- **Healt**
and M
- **Mayo**
- **Medic**
physic
- **Natio**
- **Natio**
- **Natl A**
- **Nursi**
needs
- **Senio**
- **Serva**

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383



- **Social Security Administration** www.socialsecurity.gov
- **Web MD** www.webmd.com Online medical information and advice.
- **Well Spouse Foundation** www.wellspouse.org Support to partners of the chronically ill and/or disabled.

FAMILY MEDICAL INFORMATION

Insurance (company, policy number, phone number):

Location of insurance cards (wallet/s, desk drawer or?)

Medicaid/Medicare info:

Location of organ donor card/instructions/permissions:

Prescription/Dental/Vision:

Doctors/Dentist/Etc. (name, specialty, phone number):

MEDICAL HISTORY

Name of family member/relative and approximate age at time of diagnosis (if known)

Heart disease:

Stroke:

Cancer (sp

Depressio

Diabetes:

High chole

High bloo

Miscarriag

Infant/chil

Allergies:

Amputatio

Other:

Other:

Hepatitis A

Hepatitis B

Influenza:

MMR:

Pneumoni

Meningitis

Tetanus:

Chicken po

Wri

wn)

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

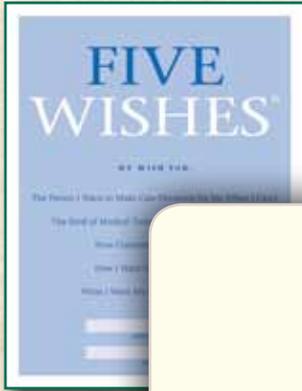
www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

MEDICAL & END-OF-THIS-LIFE DECISIONS

One of the easiest, most effective, and most broadly-recognized resources to help you make medical and end-of-this-life decisions is a booklet called, *Five Wishes*[®]. There are over four million in print. The booklet costs \$5 (or \$1 each for 100 copies or more). Place orders at www.agingwithdignity.org or by calling 1-888-594-7437.

The *Five Wishes* document is one of many possible Medical Power of Attorney forms, important forms that help you express how you want to be treated if you are seriously ill and unable to speak for yourself. It is important to sign a Medical Power of Attorney that is valid in the state where you live, and that it is properly witnessed and notarized. The *Five Wishes* form is unique among living will and health agent forms because it looks to all of a person's needs: medical, personal, emotional and spiritual. It also encourages you to discuss your wishes with your family and physician.



The *Five Wishes* booklet lets your family and doctors know:

1. Who you want to make health care decisions for you when you

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (*files sent by email*)
- **Printed Version - \$2.75 to \$29.95** (*mailed to your home or workplace*)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions - Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available - Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

What is the

(www.agingwithdignity.org)
be cared for
Five Wishes y

- **Wis**
Law
- **Wis**
beco
- **Wis**
mair
- **Wis**
be it

Why shou

important m
treatment or
clear. Not ex
treatment yo
of mind for y

When do

You never kn
18, you shou
document.

When do

with your do
you have a st
agent, can he

Is Five Wis

on the Legal Problems of the Elderly. It meets legal requirements under the advance directive statutes in most states.

For additional answers, or to order booklets for you or your loved ones, go to: www.agingwithdignity.org

you want to
you complete

for yourself.

ant, if you

in be

gs that might

control over
fe-support
ou make them
what kind of
are and peace

a health crisis.
e over age
Five Wishes

re able to talk
unicate. So if
r health care

s Commission

YOUR MOST IMPORTANT SPIRITUAL DECISION: STEPS TO PEACE WITH GOD

THE GREATEST GIFT you will ever be able to leave your family is to give them the assurance they know what will happen to you when you leave this world. In order to do this, you must receive the greatest gift that God willingly offers you, the free gift of eternal life. The Bible says in Romans 6:23, *“The wages of sin is death, but the **free gift** of God is **eternal life** through Christ Jesus our Lord.”* Read through the rest of this page to know what you must do in order to receive this free gift and live forever with God.

1. God’s Plan—Peace And Life

God loves you and wants you to experience His peace and life. The Bible says, **“For God so loved the world that he gave his only begotten Son, that whosoever believeth in him should not perish, but have life.”** John 3:16

2. Our Problem

Being at peace separated from
of the glory

3. God’s Remedy

God’s love because
Christ died on
your sins. The
own body was

4. Our Response

You can cross
personal invitation
**He gave the
His name...”**

To receive Christ

- 1) **ADMIT** your sins
- 2) **REPENT** from your sins
- 3) **BELIEVE** in Jesus Christ
- 4) **RECEIVE** His gift of eternal life

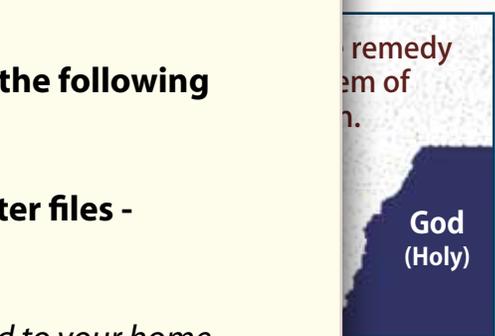
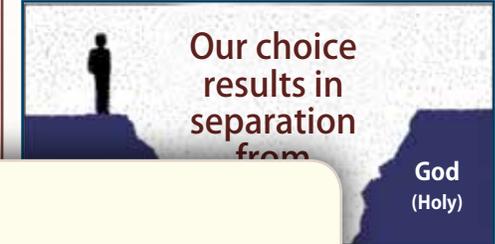
The Bible says
if any man hear
“Everyone who

Here is a suggestion

Dear Lord,
my sins. Receive
as my personal

I want my family
this world I want

Man’s signature



Religious Association
used by permission

for
you

I leave

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

Woman’s signature: _____ Date: _____

PERSONAL INFORMATION & FUNERAL PLANS (Man)

Use additional paper if necessary

| | | | |
|---------------------------------------|-------------------------|---------------|---------|
| Full Name: | Social Security Number: | | |
| Date of Birth (DOB): | Place of Birth: | | |
| Driver's License State/Number: | | | |
| Full Name of Father: | Father's Birthplace: | Father's DOB: | |
| Full Name of Mother: | Mother's Birthplace: | Mother's DOB: | |
| Siblings and their current location: | | | |
| If married, Wedding Date: | Spouse's Maiden Name: | DOB: | |
| Child #1 Name: | DOB: | Soc Sec #: | Spouse: |
| Child #2 Name: | DOB: | Soc Sec #: | Spouse: |
| Child #3 Name: | DOB: | Soc Sec #: | Spouse: |
| Child #4 Name: | DOB: | Soc Sec #: | Spouse: |
| Occupation: | | | |
| Employer: | | | |
| Do you have a driver's license? | | | |
| Grade School: | | | |
| High School: | | | |
| College/University: | | | |
| Places lived: | | | |
| Military service: | | | |
| Places served: | | | |
| Churches attended: | | | |
| Professionals: | | | |
| Closest friends: | | | |
| FUNERAL PLANS | | | |
| Church/Religion: | | | |
| Funeral Home: | | | |
| Cemetery: | | | |
| Casket or urn: | | | |
| Preferred casket/urn: | | | |
| Meal after service: | | | |
| Memorial service: | | | |
| Obituary: | | | |
| Preferred obituary: | | | |
| Flowers? | | | |
| Special Service: | | | |
| Special Service: | | | |
| Special Service: | | | |
| Preferred Service: | | | |
| Preferred Service: | | | |
| Preferred Service: | | | |
| Should casket be closed? | | | |
| Instructions: | | | |
| Clothing: | | | |
| Grave marker: | | | |
| Location of marker: | | | |
| Viewing: | | | |
| Burial/Interment: | | | |
| If casket: | | | |
| If cremated: | | | |
| Items for the memorial table: | | | |
| Location of photos (computer files?): | | | |
| Other: | | | |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

PERSONAL INFORMATION & FUNERAL PLANS (Woman)

Use additional paper if necessary

| | | | |
|--------------------------------------|----------------------|-------------------------|---------|
| Full Name: | | Social Security Number: | |
| Date of Birth (DOB): | Place of Birth: | | |
| Driver's License State/Number: | | | |
| Full Name of Father: | Father's Birthplace: | Father's DOB: | |
| Full Name of Mother: | Mother's Birthplace: | Mother's DOB: | |
| Siblings and their current location: | | | |
| If married, Wedding Date: | | Spouse's Maiden Name: | DOB: |
| Child #1 Name: | DOB: | Soc Sec #: | Spouse: |
| Child #2 Name: | DOB: | Soc Sec #: | Spouse: |
| Child #3 Name: | DOB: | Soc Sec #: | Spouse: |
| Child #4 Name: | DOB: | Soc Sec #: | Spouse: |
| Occupati | | | |
| Employer | | | |
| Do you h | | | |
| Grade Sch | | | |
| High Sch | | | |
| College(s) | | | |
| Places liv | | | |
| Military fr | | | |
| Places se | | | |
| Churches | | | |
| Professio | | | |
| Closest fr | | | |
| FUNE | | | |
| Church/C | | | |
| Funeral H | | | |
| Cemetery | | | |
| Casket or | | | |
| Preferred | | | |
| Meal afte | | | |
| Memoria | | | |
| Obituarie | | | |
| Preferred | | | |
| Flowers? | | | |
| Special S | | | |
| Special S | | | |
| Special P | | | |
| Preferred | | | |
| Preferred | | | |
| Preferred | | | |
| Should g | | | |
| Instructi | | | |
| Clothing | | | |
| Grave ma | | | |
| Location | | | |
| Viewing c | | | |
| Burial/Cr | | | |
| If casket, | | | |
| If cremate | | | |
| Items for the memorial table: | | | |
| Location of photos (computer files?) | | | |
| Other: | | | |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

DISTRIBUTION OF SPECIAL PERSONAL POSSESSIONS

To view filled out samples, go to: www.MyFamilyForms.org

This form helps you consider leaving specific personal items to specific people or ministries – your children, grandchildren, relatives, special friends, colleagues, church, Christian workers, ministries, charities, etc. Items to be considered could include:

- | | | | |
|--------------------------------|--------------------|-----------------------------|---------------|
| ■ Special collections | ■ Handmade items | ■ Bibles | ■ Craft items |
| ■ Jewelry | ■ Travel artifacts | ■ Sports/Hunting/Recreation | ■ Pictures or |
| ■ Instruments | ■ Family heirlooms | ■ Entertainment equipment | ■ Photographs |
| ■ Certain articles of clothing | ■ Dishes | ■ Electronics | ■ Tools |
| ■ Military paraphernalia | ■ Silverware | ■ Furniture | _____ |
| ■ Awards | ■ Kitchenware | ■ Vehicles | _____ |
| ■ Artwork | ■ Books | ■ Antiques | _____ |

In the form below, write a description for the specific item, then put a “P” after the item if you have personally talked with the person about this item, and they know it has been promised to them. Put an “S” after the item if this gift will be a surprise to the person who draws up your will.

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

EQUITABLE DISTRIBUTION OF FAMILY POSSESSIONS

To view filled out samples, go to: www.MyFamilyForms.org

After the distribution of Special Personal Possessions (see previous form), there will usually be additional items that need to be distributed. Use this form to equitably distribute remaining possessions.

Instructions:

- A. Have one individual go through the remaining possessions and write down brief item descriptions (Make additional copies of this form if necessary).
- B. Make copies of this completed inventory and distribute to family members.
- C. Allow everyone a specific time period (probably 24 or 48 hours) to fill out this sheet.
- D. Have everyone put the following numbers by each item:
- E. They will then divide up the items equitably.

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

| Name(s) | Item Description | Choice # | |
|---------|------------------|----------|----|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |
| 6 | | | |
| 7 | | | |
| 8 | | | |
| 9 | | | |
| 10 | | | |
| 11 | | | |
| 12 | | | |
| 13 | | | |
| 14 | | | |
| 15 | | | |
| 16 | | | |
| 17 | | | |
| 18 | | | |
| 19 | | | |
| 20 | | | |
| 21 | | | |
| 22 | | 45 | 68 |
| 23 | | 46 | 69 |

PEOPLE AND GROUPS TO NOTIFY ABOUT MY HOMEGOING

Suggestion: It is often possible to have your family contact “one key person” who will contact/call someone and have them call others on your family’s behalf (e.g. one well networked cousin can contact all of our other cousins).

LOCATION OF MY ADDRESS BOOK: _____.

Potential people or groups to be notified of your homegoing could include:

- Parents
- Grandparents
- Siblings
- Cousins
- Aunts-Uncles
- Nieces-Nephews
- Children
- Grandchildren
- Great Grandchildren
- Employers
- Hobby friends
- Churches
- Civic Groups/Clubs
- Professional journals/magazines/newsletters
- Alumni magazines

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 300 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

40+ THINGS TO DO AFTER A LOVED ONE DIES

| Date | Items a Spouse, Family Member(s) or Executor Needs to Review and Act Upon (As Applicable) |
|------|--|
| | 1. Make sure the person's organ donation wishes are followed. |
| | 2. Contact funeral home <i>(if applicable, have prepaid funeral plans or life insurance information available)</i> . |
| | 3. Contact clergy and/or church. |
| | 4. Locate address book and notify family and friends <i>(by phone and/or e-mail)</i> . |
| | 5. Place obituary(s). |
| | 6. Contact Veterans Administration <i>(Military honors for funeral and death benefits)</i> . www.va.gov |
| | 7. Conduct viewing and/or service(s). |
| | 8. Order an adequate number of death certificates from the funeral home <i>(at least 10-15)</i> . |
| | 9. Locate will, trusts, important papers/documents/statements/memos/deeds/titles. |
| 10 | |
| 11 | |
| 12 | |
| 13 | |
| 14 | |
| 15 | |
| 16 | |
| 17 | |
| 18 | |
| 19 | |
| 20 | |
| 21 | |
| 22 | |
| 23 | |
| 24 | |
| 25 | |
| 26 | |
| 27 | |
| 28 | |
| 29 | |
| 30 | |
| 31 | |
| 32 | |
| 33 | |
| 34 | |
| 35 | |
| 36 | |
| 37 | |
| 38 | |
| 39 | |
| 40 | |
| 41 | |
| 42 | Distribute any pictures, personal mementos, family heritage/legacy information to family, relatives, friends. |
| | 43. Research if there is any unclaimed money sitting in insurance companies, banks, utility companies, stocks, etc., go to: www.missingmoney.com |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** *(files sent by email)*
- **Printed Version - \$2.75 to \$29.95** *(mailed to your home or workplace)*
- **Printed Version with Customized Covers (4 pages) - \$1/copy** *for 300 or more*
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org
Toll-free 866.935.5884 Phone: 719.302.3383

TOP 10 ESTATE PLANNING MISTAKES

Here is a “Top 10 List” pertaining to an important topic—will and estate planning. This list may start you thinking about your estate plan. Perhaps you’re making one or more of the following mistakes:

1. **Thinking you don’t need an estate plan:** No estate is too small, and you’re never too young to have an estate plan. This lets your loved ones know how you want your assets distributed. Every adult, regardless of age, should have an estate plan.
2. **Putting off writing or updating your will:** Later may be too late. It is especially important for families with minor children to have a will specifying legal guardians and trustees.
3. **Having a will as your total estate plan:** There are other important parts to an estate plan besides a will. Many of the forms in this Legacy Organizer will be vital to your family’s welfare.
4. **Underestimating the size of your estate:** Your estate is probably worth more than you think. Have you considered life insurance, appreciated value of your home and property, potential inheritances, retirement plans, etc.? Accurate values make a big difference in estate tax planning.
5. **Leaving**
For son
substan
6. **Not un**
7. **Not usi**
individu
8. **Keepin**
you tak
9. **Failing**
insuran
to find t
10. **Failing**
leaving
causes

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (*files sent by email*)
- **Printed Version - \$2.75 to \$29.95** (*mailed to your home or workplace*)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

There

- You need
- because
- Addition
- You wa
- You hav
- Your fir
- You des
- A benef
- Tax law
- Profess
- increas
- Your at
- Your spouse has died, or you have become divorced.
- You want to include additional individuals in your estate plans (i.e., new grandchildren or great grandchildren).
- You want to change (add, delete, modify) how much a specific individual, church, ministry, or charity receives.

ouse:

in result in
ving spouse.
per planning.
ed ones and
son.
ate unless
ments,
where
nsidered
ristian

ernment.
ed,
ng.

?

er of attorney
role.
rage children.

ation.

ility and

TOP 5 WAYS TO GET YOUR HOUSE IN ORDER

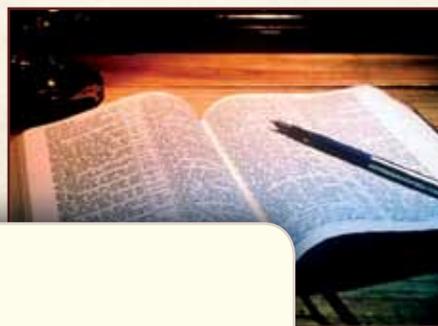
Facing Fundamental Issues Regarding Your Faith, Final Wishes, Finances, Family & Funeral

To listen to this message by Internet, MP3, or as a Podcast, go to: www.MyFamilyForms.org

"This is what the LORD says: Put your house in order, because you are going to die." Isaiah 38:1

1. Get your faith in order

- **Ecc. 9:12** *No man knows when his hour will come.*
- **Heb. 9:27** *It is destined that each person dies only once and after that comes judgment.* ^{NLT}
- **2 Cor. 5:10** *We (Christ following believers) must all appear before the judgment seat of Christ, that each one may receive what is due him for the things done while in the body, whether good or bad.*
- **1 John** *life is in God doe the Son*
- **John 3:**



PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

2. Get yo

- **Prov. 2** *suffers t*
- **2 Cor. 5** *wonderj hands. 1 heavenl bodies n*

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)

3. Get yo

- **Prov. 2** *interests*
- **Prov. 3:** *labors a*
- **Deut. 1**

- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**

4. Get yo

- **Prov. 1:**
- **Prov. 2** *(See als*
- **Prov. 1**
- **Prov. 1** *prudent*

- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

5. Get yo

- **1 Thess** *the rest Jesus th*

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

The rest of this manual provides helpful Biblical insights, practical ideas, and helpful forms to better communicate your medical wishes (health care directives), financial information, life legacy, Biblical generosity, and funeral planning desires with loved ones and professionals.

Possible ideas for “early inheritance gifts” for children or grandchildren could include: funds for education, vocational training, help in establishing a business, equipment, house down payment, household furnishings, music or athletic lessons, adoption, etc. According to current IRS rules, you’re allowed to give \$12,000 tax-free to any person or child each year.

6. Be wise when distributing wealth or estate resources

- **Prov. 17:16** What use is money in the hand of a fool, since he has no desire to get wisdom?
- **Prov. 17:2** A wise servant will rule over a disgraceful one of the house.
- **Job 42:15** The Lord granted the riches of the land to Job.
- **Luke 9:25** Jesus said to the man, “You are unwilling to give up what you have for my sake?”

7. Be wise in your beliefs and values

- **Prov. 22:6** Train up a child in the way he should go, and when he is old he will not depart from it.
- **Deut. 6:6-7** These commandments that I command you today shall be on your hearts. Tie them as symbols on your hands and fasten them as frontals on your foreheads.

8. Research treasure in the past

- **Matt. 6:19** Do not store up treasure on earth, where moth and rust destroy, and where thieves break in and steal.
- **1 Tim. 6:17** Command the rich in this world not to be arrogant or to hoard wealth or to be puffed up because of their wealth, for their wealth will fade like a withering flower.

9. Be wise in your choices

- **Prov 27:1** Do not boast about tomorrow, for you may not live through it.
- On pages distributed following the funeral, the following information should be distributed:

Distribute the following information to the family and friends:

Distribution 4: Any remaining assets are to be sold and/or given to local charities (i.e., ARC, Salvation Army, or Goodwill).



PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

GUARDIAN CHOICES FOR CHILDREN

To view filled out samples, go to: www.MyFamilyForms.org

One of the most important decisions you need to make concerning your under-age children is who will become their guardian if you were to die before they were 18. Even after 18 years old, it is still important to designate someone who can help provide godly counsel, wisdom, prayer, and care for their life and their choices. It will be helpful to consider each child individually,

as well as the family unit, when it comes to guardianship issues. It is usually best to appoint a few choices in order of your preference, in case a desired guardian is unavailable or unable to serve in this important role. In addition to family considerations, it is important to identify potential guardians who share similar spiritual and personal beliefs.

| Name of Child: | | Date of Birth: | | Soc Sec #: | |
|-----------------------------------|--|----------------|--|---|--|
| Likes & Dislikes: | | Special notes: | | Wishes for future activities/experiences: | |
| | | | | Your hopes/dreams for their future: | |
| 1 st Choice - Name: | | | | | |
| Email: | | | | | |
| 2 nd Choice - Name: | | | | | |
| Email: | | | | | |
| 3 rd Choice - Name: | | | | | |
| Email: | | | | | |
| Name of Child: | | | | | |
| Likes & Dislikes: | | | | | |
| | | | | Your hopes/dreams for their future: | |
| 1 st Choice - Name: | | | | | |
| Email: | | | | | |
| 2 nd Choice - Name: | | | | | |
| Email: | | | | | |
| 3 rd Choice - Name: | | | | | |
| Email: | | | | | |
| Name of Child: | | | | | |
| Likes & Dislikes: | | | | | |
| | | | | Your hopes/dreams for their future: | |
| 1 st Choice - Name: | | | | | |
| Email: | | | | | |
| 2 nd Choice - Name: | | | | | |
| Email: | | | | | |
| 3 rd Choice - Name: | | | | | |
| Email: | | | | | |
| Name of Child: | | | | | |
| Likes & Dislikes: | | | | | |
| | | | | Your hopes/dreams for their future: | |
| 1 st Choice - Name: | | | | | |
| Email: | | | | | |
| 2 nd Choice - Name: | | | | | |
| Email: | | | | | |
| 3 rd Choice - Name(s): | | Phone: | | Location: | |
| Email: | | | | Relationship: | |

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

HELPFUL IDEAS FOR A FAMILY MEETING

In the Bible, when people were nearing the end of this life they often gathered their family members around them and communicated important information with them.

If you effectively use many of the forms and lists in this *LEGACY ORGANIZER*, you will be in a wonderful position to clearly communicate a great deal of valuable information and important instructions to your spouse and loved ones. The best way to normally do this is to schedule a special evening, weekend retreat, or even a family vacation to gather family together and share important information everyone needs to know and understand. Without some type of clear verbal and written communications, family members often find themselves confused, upset, and hurt about things that happen in the closing months and the months following the death of a parent.

NOTE: Sometimes a family meeting is called and organized by the aging parents for their adult children (and possibly spouses and older siblings) to come to the meeting with their professional help together. A professional family meeting guide a family meeting.



PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

1. Take notes during the meeting.
2. Recall the information discussed.
3. Reflect on the information discussed.
4. Ask questions.
5. Identify the information discussed.
6. Have a family meeting.
7. Talk to your family members about the information discussed.
8. Talk to your family members about the information discussed.
9. Review the information discussed.
10. Go over the information discussed.
11. Go over the information discussed.
12. Share the information discussed.
13. Share the information discussed.
14. If applicable, share the information discussed.
15. Share the information discussed.
16. Determine the information discussed.
17. Pray together. Sing a favorite hymn together.

Some of these helpful ideas were provided by investment and family advisor, T. Randall Fairfax of www.highlandusa.net

ESTATE PLANNING TOOLS FOR EFFECTIVE CHRISTIAN & CHARITABLE GIVING

Adapted from materials by Dick Edic of www.VisionResourcingGroup.com

In 2 Kings 20:1, the prophet Isaiah went to King Hezekiah and said, "Put your house in order, because you are going to die; you will not recover." Basically, God was telling Hezekiah to complete his estate planning, so that when he died, his wishes could be carried out by those who survived him. Proverbs 13:22 says, "A good man leaves an inheritance for his children's children". Estate planning is the process of planning your estate in such a way that after you die, it properly affects the people in your life, transfers your property efficiently while minimizing probate and tax expense, and guides those who will assist you in achieving your goals. It involves the right legal documents that the process is the us by God to c Here is a list o

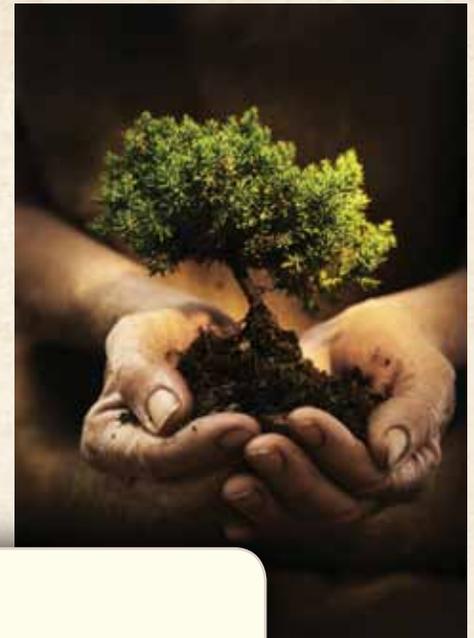
Bequests A living trust, and or her estate. S family member a specified doll is often more d of a will or trus circumstances

Life Estate lifetime enjoyn may continue t At the person's ministry may s keep the home a tax-deductibl government ta the agreement the Federal Es

Life Insura gift option is av as a charitable the Federal Es Federal Estate significant casl out or wait untl beneficiaries o their will or livi

Charitable income during is possible to t year the trust i Remainder Uni the trust woulc in the trust. At t

Unitrust is one of the most technical gift plans, and requires expert help to both set up and manage. Your church's denominational foundation or independent counsel should be able to assist from the beginning to the end of this process.



PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

ve a will or s through his the estate to or trust can be l is written, it the benefits l financial Tax purposes.

t retain y, the person the property. e church or may decide to will generate ording to s in the year er probate or

wise. This be deducted alation of es of the ies with cash them as one of the s just like in

it needs al estate). It ailable for the d. A Charitable ransferred to may be named ble Remainder

Charitable Lead Trust is almost the opposite of the Charitable Remainder Unitrust. The person creates a trust to provide current income to a charitable organization for a specified period of time (5, 10, 15, or more years). At the end of that time the assets of the trust are returned to family members. The Charitable Lead Trust may help wealthy families transfer assets to heirs, with little or no estate or gift tax. Seek professional counsel.

Gift Annuity Agreement - Deferred Gift Annuity Agreement is a perfect plan for a person who wants to make a future gift and receive a guaranteed stream of income for life. Annuity rates are based on age, and often are quite competitive with what a person can earn from low risk investments in the market. A deferred payment annuity allows for payments to begin at a later day (such as at retirement), and results in both a larger charitable gift and a greater annual income. Both immediate and deferred annuity plans are an excellent means of “supplementing” retirement income, but are not meant to be retirement plans.

Charitable Gift Annuity is less complicated than a Charitable Remainder Unitrust (CRUT), but the CRUT has greater flexibility and applications. This plan provides a Federal Income Tax deduction in the year that the annuity is entered. The amount of the gift is determined by the age of the annuitant, the annuity rate, and the principal amount. Another advantage of the gift annuity is that part of the annual income is considered tax-exempt. Also, if the annuity is funded with appreciated securities, there is significant savings related to capital gains tax. A portion of the capital gain is avoided altogether, and the remainder is reported in small increments available for the annuitant's death are the estate and Annuity Agreement minister Christian Administration services.

Living Trust bequest, just like process.

Naming a Christian minister would be one refer to this as beneficiary and

Retirement may be two tax the “secondary” same amount the other spot account and children, that the proceeds. taxes can be a real estate, co- friends.

Automatic Such transfers Examples are

Endowment endowment of funds can pro

Outright gifts might include some form of

deductible value of some gifts will be limited to the person's cost basis or the fair market value (whichever is lower). You will be allowed to deduct the full value of some gifts (including all appreciation), and will avoid any tax on capital gain. Any property given during life will be removed from the estate, and will not be subject to probate or the Federal Estate Tax.

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (*files sent by email*)
- **Printed Version - \$2.75 to \$29.95** (*mailed to your home or workplace*)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

ADDITIONAL RESOURCES

Resources for your personal finances

- Crown Financial Ministry: www.Crown.org or 800-722-1976
- Compass - Finances God's Way: www.Compass1.org
- Willow Creek Association's Good Sense Ministry: www.GoodSenseMinistry.com
- Dave Ramsey Radio Show: www.DaveRamsey.com
- www.iQuestions.com Experts provide video answers to questions about life and finances
- www.360financialliteracy.org

Resources to help you become more generous

- www.GenerosityPledge.org Movement 30 day devotional on the 7 Keys to Open-Handed Living in a Tight Economy

PREVIEW PAGE

The Legacy Organizer can be purchased in the following formats to best serve your needs:

- **Microsoft Word and Adobe PDF computer files - \$4.95 to \$19.95** (files sent by email)
- **Printed Version - \$2.75 to \$29.95** (mailed to your home or workplace)
- **Printed Version with Customized Covers (4 pages) - \$1/copy** for 500 or more
- **Copyright Reprints for Corporations / Firms / Churches / Non Profits - \$99 to \$999**
- **Copyright Partnership for Customized versions – Go to www.MyFamilyForms.org for details**
- **Non-Religious Version Available – Go to www.MyFamilyForms.org for details**

www.MyFamilyForms.org

Toll-free 866.935.5884 Phone: 719.302.3383

PRODUCTS AND RESOURCES BY DR. BRIAN KLUTH

GENEROSITY DEVOTIONALS FOR CHURCH-WIDE USE

“40 Day Spiritual Journey to a More Generous Life”

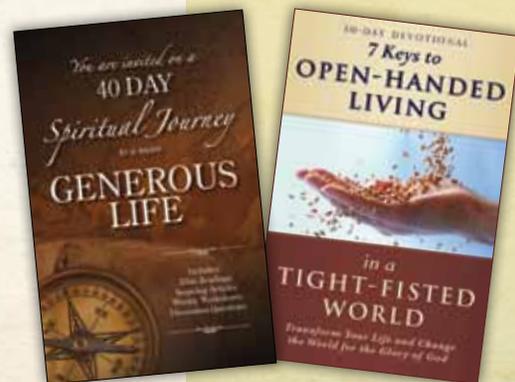
Preview digital copy or order at www.GenerousLife.org

(Over 450,000 copies & translations in over 40 foreign languages)

30 Day Devotional: “7 Keys to Open-Handed Living in a Tight-Fisted World”

Preview digital copy or order at www.GenerosityPledge.org

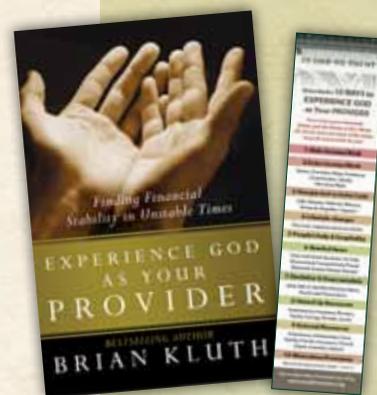
Brian’s generosity devotionals, videos, and companion materials have been used by thousands of churches across America and around the world to inspire greater generosity and increase giving. Some church have even reported miraculous results when they have seen giving increases of 10%, 20%, 35%, 50%, 60%, 100%.



BOOK, AUDIO TEACHING CD, AND BOOKMARK

“Experience God as Your Provider: Finding Faith and Financial Stability in Unstable Times”

This material and teaching has revolutionized people’s thinking and helped them understand that God is bigger than stock markets, job markets, and housing markets. Regardless of what is happening in the world’s economy, God has many creative ways to care for people in the midst of challenging times. These materials are ideal for churches, Sunday School classes, small groups, or personal use. These resources make great appreciation gifts for ministries to give to their donors/supporters. Discounts are available for group or larger orders. Go to: www.GodsYourProvider.com



ONLINE GENEROSITY KITS or CD FOR CHURCHES

Downloadable Internet Packages of Generosity Resources for Churches

In these online Generosity Kits (or CD), pastors, leaders and committees will receive a smorgasbord of hundreds of dollars of generosity resources they can use to inspire greater generosity and increase giving. Packages run from \$59 and up and include Power Point offertory slides, generosity cartoons, flyers, materials for church finance and stewardship committees, sermon helps, planning guides and worksheets, videos, “best generosity practices” of leading churches, and much more! To order or to preview, go to: www.MAXIMUMgenerosity.org



MEDIA INTERVIEWS & GUEST SPEAKING

Dr. Brian Kluth is recognized as a national media expert and speaker on end of life issues, giving trends in America, and generosity. He has been interviewed or his work has been featured by CNN, NBC, CBS, FOX, CBN, USA Today (front page), Washington Times (front page), National Public Radio, Wall Street Journal, Kipliners, Reuters, Christianity Today, Chronicle of Philanthropy, and hundreds of radio programs, newspapers, and magazines. Brian is also a frequent key note guest speaker at large churches, colleges, financial conferences, clergy gatherings, leadership conventions, and fundraising events. For video/audio clips of Dr. Kluth’s speaking or being interviewed on TV/radio, go to: www.kluth.org

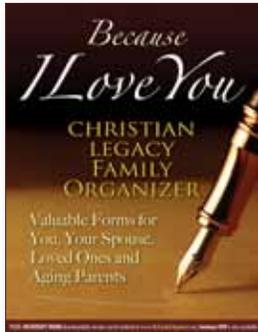


ORDERING THE LEGACY ORGANIZER

ORDER ONLINE AT: www.MyFamilyForms.org

or CALL 866.935.5884 or 719.302.3383

PAPER VERSION



\$29.95 for 1 copy
\$19.95 each for 2 copies
\$14.95 each for 3 to 9 copies
\$9.95 each for 10 to 19 copies
\$7.95 each for 20 to 49 copies
\$4.95 each for 50 to 99 copies
\$3.95 each for 100 to 299 copies
\$2.95 each for *300 to 999 copies
\$2.85 each for *1000 to 2499 copies
\$2.75 each for *2500 to 15000 copies

CALL for *custom quote* for over 15,000 - 1-866-935-5884

***If you order 500 copies or more, you can customize the 4 page cover for just \$1/more per copy. This is a great gift that will be used and appreciated for years to come!**

COMPUTER VERSION: MICROSOFT WORD & ADOBE PDF DIGITAL VERSION

For personal use, you can order the LEGACY ORGANIZER as a Microsoft Word and Adobe PDF version so you can print out pages OR customize any of the forms OR fill in the forms by computer (so you can edit and update the information as needed).

\$19.95 each for 1 copy
\$14.95 each for 2 copies
\$9.95 each for 3 to 9 copies
\$6.95 each for 10 to 49 copies
\$4.95 each for 50 to 100 copies



90 Minutes Seminar DVD \$10

COPYRIGHT REPRINT PERMISSION (Corporate / Church / Non Profit)

Receive a link to a webpage that will allow you to download an Adobe PDF file of the entire Legacy Organizer and PDF's of ALL the individual forms so you can print, photocopy, or post online to share with others

\$99 to share with up to 50 people (*the entire Legacy Organizer OR any of the individual forms*)
\$249 to share with up to 500 people ("")
\$499 to share with up to 1000 people ("")
\$799 to share with up to 2500 people ("")
\$999 to share with up to 5000 people ("")

CALL for *custom quote* to share with over 10,000 people - 1-866-935-5884

INDIVIDUAL FORMS FOR MEDIA INTERVIEWS & PUBLICATIONS

For media interviews or articles, call Brian Kluth at 720.432.2422 (cell) or send an email to bk@kluth.org

Brian Kluth is available for interviews for radio, TV, online, and print media. He also provides articles for print and online publications. Special arrangements can be made to make any of the individual forms available so they can appear in a printed publication or be posted online. Brian's financial work and research has been covered by CNN, NBC, FOX, CBS, ABC, Wall Street Journal, Washington Times (front page), Kiplingers, USA Today (front page), Associated Press Radio, NPR, and hundreds of radio stations and newspapers.

COPYRIGHT PARTNERSHIP FOR CUSTOMIZED VERSIONS

If you are interested in information or pricing for any of the following call 1-866-935-5884

FULL CUSTOMIZED VERSIONS are available to groups, organizations, companies, or churches that want to create their own customized version of the LEGACY ORGANIZER or any of the individual forms. Copyright permission is purchased (based on the quantity to be produced) that allows for full editing, adding, deleting or modifying any and all of the pages. Once an agreement is purchased, the LEGACY ORGANIZER'S InDesign software electronic files are provided to the purchaser. Printing can be done by their own printers or we can assist with providing a printing quote.

NON-RELIGIOUS LEGACY VERSION AVAILABLE

For businesses, non-profits, groups, and financial professions that are interested in the legacy and end-of-life forms of our LEGACY ORGANIZER, there is a modified **non-religious** version available. Please go to www.MyFamilyForms.org for details.

“In this LEGACY ORGANIZER I tried to create for you and your loved ones the most comprehensive collection of helpful family forms anywhere on the planet! I trust that any and every form you choose to fill out and use will help save hours, hassles, headaches, and heartache for you and the people you care about.” DR. BRIAN KLUTH

TOP 10 TIPS

on how to best use your LEGACY ORGANIZER

1 Go to the www.MyFamilyForms.org website and listen to any of the available audio files or watch the videos to hear true stories that will inspire you on why and how to use many of the pages in this manual.

2 Show or tell others about this helpful manual. Purchase paper or digital copies for family members, friends, clients, and others.

3 Pick out a regular block of time each week for a few months (a morning, afternoon, or evening) to work on filling out pages that you know will be the most helpful to you, your spouse, and your loved ones.

4 Write in pencil so you can later update or edit any information that changes.

5 Bring the **LEGACY ORGANIZER** along to family gatherings (Christmas, Easter, Thanksgiving, family reunions, birthday parties, etc.) and have people discuss and fill out information on your family tree, 100 questions, birthdays and anniversaries, gift giving ideas, and more.

6 If you have aging parents, have personal or family meeting(s) with them and help them fill out important information that is needed concerning their end of this life issues (especially the family tree and

history section, financial information, medical wishes and history, funeral pages, distribution of possessions, spiritual matters, etc.).

7 Organize a small group of people to meet together 4-8 times to work through the **LEGACY ORGANIZER** together and to hold each other accountable to keep making progress on filling out many of the key pages in this manual. The group could consist of people in your neighborhood, workplace (meet over the lunch hour), friends, family, church, Sunday School, Bible study, book group, and ladies group.

8 Tell your church leaders, financial professionals, or non-profit organizations you support about this manual. Encourage them to order copies to give to their members, clients, or donors.

9 Go to the www.MyFamilyForms.org website and order the electronic version so you can customize any page to fit you and your situation. You can also print out pages and put them in a 3-ring binder.

10 Order the electronic version so you can update and edit the information and easily email it to family members in other places. Keep a file of this paper version or electronic document with your will.

© COPYRIGHT RULES CONCERNING YOUR USE OF THE FORMS IN THIS LEGACY ORGANIZER

All material in this LEGACY ORGANIZER has been developed through the personal experiences, work, and research of Dr. Brian Kluth. Once you have purchased a paper and/or electronic copy of the LEGACY ORGANIZER (or have been given a copy as a gift), you have permission to photocopy or print the forms in this manual for your personal use and to share your completed forms with others. If you want other family members and friends to have the blank forms found in this LEGACY ORGANIZER, please purchase a paper or electronic version for them or direct them to the www.MyFamilyForms.org website so they can make their own purchase. Photocopying, emailing, and/or distributing blank forms to others is not allowed. Copyright and reprint permission for specific forms is available upon request by emailing organizer@kluth.org with the details of how the form(s) will be used or modified and who will receive the forms (copyright fees may apply). Details and special pricing options for CUSTOM COVER copies and FULL CUSTOM VERSIONS (see page 39) are available upon request by calling 1-866-935-5884. Contact information: Dr. Brian Kluth, MAXIMUM Generosity, 9415 Wickerdale Ct. Highlands Ranch, CO 80130, organizer@kluth.org.

© Dr. Brian Kluth. All rights reserved. Contents and blank forms may not be reproduced in whole or part in any form without the express written consent of the Author. DESIGNED BY: Leana Santana Scripture taken from the HOLY BIBLE®, NEW INTERNATIONAL VERSION. NIV® COPYRIGHT© 1973, 1978, 1984 by International Bible Society. Used by permission. All rights reserved. Any verses that are not NIV are designated as NLT (New Living Translation), TLB (Tyndale Living Bible), and KJV (King James Version). Holy Bible, New Living Translation, copyright © 1996 by Tyndale Charitable Trust. All rights reserved. Scripture quotations marked (NLT) are taken from the Holy Bible, New Living Translation, copyright © 1996. Used by permission of Tyndale House Publishers, Inc., Wheaton, Illinois 60189. All rights reserved. The Living Bible, copyright © 1971. Scripture quotations marked (TLB) are taken from the Living Bible. Used by permission of Tyndale House Publishers, Inc., Wheaton, Illinois 60189. All rights reserved. The two Scripture quotations marked (KJV) are taken from the King James Bible. Most photos were purchased from www.istockphotos.com. ISBN13: 978-1-4507-5272-5 Retail: \$29.95US

The Christian Legacy Organizer

Your **ULTIMATE GUIDE** for organizing:

- ✓ Household Information
- ✓ Family History
- ✓ Important Records
- ✓ Finances
- ✓ Family Tree
- ✓ Password/Login Codes
- ✓ Will & Estate Plans
- ✓ Charitable Giving
- ✓ Important Faith Issues
- ✓ Care Giving (for Aging parents or Family Members)

A **GREAT GIFT** idea for:

- ✓ Parents
- ✓ Clients
- ✓ Friends
- ✓ Donors
- ✓ Family
- ✓ Employees
- ✓ Aging Relatives
- ✓ Church or group members
- ✓ Selling in stores, salons, shops and waiting rooms



About the Author and Speaker

DR. BRIAN KLUTH is a bestselling author, inspirational speaker, minister, and a leading media expert on end of life issues, giving in America, and generosity. He has been interviewed or his work has been featured by CNN, NBC, CBS, FOX, CBN, *USA Today*, *Washington Times*, *National Public Radio*, *Wall Street Journal*, *Kipliners*, *Reuters*, *Christianity Today*, *Chronicle of Philanthropy*, and hundreds of radio programs, newspapers, and magazines.

Brian is also a frequent key note speaker at large churches, colleges, financial conferences, clergy gatherings, leadership conventions, and fundraising events. Brian lives with his family in Denver, CO.

