Because I Love You

CHRISTIAN LEGACY ORGANIZER

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

PLUS: MICROSOFT WORD downloadable version can be ordered at www.MyFamilyForms.org. Seminar DVD is also available.
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,

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.


Disclaimer: The LEGACY ORGANIZER is only to be considered informative in nature and is designed to be a useful resource to help you better organize your personal information and instructions for loved ones. None of these forms is a legal document and should not be used as such. Please consult with an attorney, accountant, financial planner, funeral professional, and/or charitable estate planner to develop official and legal documents for your medical, estate, financial, charitable, or funeral needs. Special copyright rules apply for your personal use and sharing of the material in this manual, please see the bottom of the back inside cover for details. © Dr. Brian Kluth | www.MyFamilyForms.org | 5201 Pinon Valley Rd. | Colorado Springs, CO 80919 | organizer@kluth.org
LEGACY ORGANIZER
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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.
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.

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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 ever taken or called to the principal’s office? Why? Did you ever go through a time of rebellion?

Special or silly talents or abilities you had growing up (or still have)?

Did you ever have any nicknames growing up? What were they? Who gave them to you?

What do you remember about the people and the neighborhood where you grew up? What did the kids do for fun in your neighborhood? What were some funny stories or people you remember?

What were experiences you had growing up camping, hunting, fishing, going on vacations, going to camp, going to summer school, being on a farm, going on retreats, being in the scouts, etc.?

Awards, trophies, records, badges, medals, scholarships, elections, or prizes you won?

What about college—if you didn’t go, why not? If you did go, what was your major and why did you choose this major?

First crush? First kiss? First serious boyfriend/girlfriend? First heartbreak? First job(s)? First car?

Most funny, unique, memorable, amazing, unusual memories you have of growing up?

Names (and cities where they live or lived) of aunts, uncles, cousins, and grandparents?

What were your political affiliations, beliefs, involvements, offices, or views of voting and citizenship?

Did you have physical or medical problems as a child or in your adult life?

Were you ever in a serious accident? Were you ever in a hospital?

What was the biggest event you ever attended (concert, conference, rally, game, etc.)?

The three people that have had the greatest influence on you—what did you learn from them?

Lessons learned from failures or difficulties in your life? Hardest times in your life?

Places you’ve traveled? Most exciting or fun things you’ve ever done?
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 memories of your children? Most difficult, fun, or frightening experiences with your children?

Did you ever invent anything, write a book, make a musical recording, or…?

Lessons you learned along the way about money - earning, saving, giving, borrowing, investing, budgeting, gambling, credit, record keeping, paying taxes, shopping, etc.?

Lessons you learned about marriage and relationships - loving, forgiving, caring, helping, talking, or more?

Names of your sister(s), brother(s), their spouse (and where they live) and their children (and where they live)? How did you get along with your sister(s) and brother(s)?

Special attributes and abilities you see in each child and/or grandchildren? Things about them or special times when you were really proud of them?

What do you remember about how you chose each child’s name?

Specific wishes and desires you have for your children and/or grandchildren?

Favorite aunt/uncle, coach, teacher, employer, friend, pastor, etc.? Why?

What are some of your favorite songs, funny songs, and hymns? If you can, sing them.

Jobs, vocations, occupations, and employers you’ve had over your lifetime?

What was the dumbest, bravest, most foolish, courageous, funniest, or smartest thing you ever did?

What were the circumstances or people that influenced you on your primary career path?

If you were in the military, where did you go, what was your rank, what are your most vivid memories, what did you learn, and how did you benefit from the military?

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

Lessons have you learned about gambling, lying, cheating, laziness, immorality, drinking, smoking, or drugs?

Favorite hobbies, interests, activities, and sports you enjoyed in your lifetime?

Greatest tragedies or disappointments you've experienced? Greatest regrets? Greatest joys?

YOUR SPIRITUAL HERITAGE—Churches you were part of?

Circumstances and details on how you were born again?

When were you baptized?

In what ways or places have you served the Lord?

Spiritual gifts God gave you? How you used your time/abilities/gifts to serve and follow the Lord?

Stories of God's leading, provision, calling, faithfulness, forgiveness, or more?

People that most influenced you in your spiritual journey? How did they impact your life?

Things you learned and practiced about reading, studying, memorizing, and obeying the Bible?

Favorite Bible verses? Explain why these are special (or stories) about how God used these verses in your life?

How and when you came to be a generous giver? What ministries did you faithfully support? Why?

Are you assured and confident you will go to heaven when you die? What are you basing your answer on?

Other:

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.

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www.MyFamilyForms.org
Toll-free 866.935.5884  Phone: 719.302.3383
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)
- **C** (Cemetary location)
- **A** (Adopted)
- **D** (Date of death)
- **H** (Half-sibling)
- **SS** (Step-sibling)

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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)
- **C** (Cemetery location)
- **D** (Date of death)
- **A** ( Adopted)
- **H** (Half-sibling)
- **SS** (Step-sibling)

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WOMAN’S FAMILY TREE

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- **S** (Spouse’s first name/maiden name)
- **L** (Current location: city/town)
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- **C** (Cemetery location)
- **A** (Adopted)
- **H** (Half-sibling)
- **D** (Date of death)
- **SS** (Step-sibling)

### FATHER:

- Father’s Father:
- Father’s Mother:
- Father’s Sibling 1/Spouse:
  - Children:
- Father’s Sibling 2/Spouse:
  - Children:
- Father’s Sibling 3/Spouse:
  - Children:

### MOTHER:

- Mother’s Father:
- Mother’s Mother:
- Mother’s Sibling 1/Spouse:
  - Children:
- Mother’s Sibling 2/Spouse:
  - Children:
- Mother’s Sibling 3/Spouse:
  - Children:

### SIBLING 1:

- Child 1:
  - Children:
- Child 3
  - Children:

### SIBLING 2:

- Child 1:
  - Children:
- Child 3
  - Children:

### SIBLING 3:

- Child 1:
  - Children:
- Child 3
  - Children:

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# 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](http://www.holidaysmart.com)*

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

<table>
<thead>
<tr>
<th>JANUARY</th>
<th>FEBRUARY</th>
<th>MARCH</th>
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## 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.

<table>
<thead>
<tr>
<th>Name, Company, Phone Numbers, Address or E-mail</th>
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<td>Accountant</td>
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<td>Appliance repair</td>
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<td>Attorney</td>
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<td>Auto Insurance</td>
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<td>Baby sitter</td>
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<td>Electrician</td>
</tr>
<tr>
<td>Employee Benefits</td>
</tr>
<tr>
<td>Estate Executor</td>
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<tr>
<td>Exterminator</td>
</tr>
<tr>
<td>Financial advisor</td>
</tr>
<tr>
<td>Handyman</td>
</tr>
<tr>
<td>Heating &amp; air Cond</td>
</tr>
<tr>
<td>Home insurance</td>
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<tr>
<td>Home warranty</td>
</tr>
<tr>
<td>Hospital</td>
</tr>
<tr>
<td>Interior decorating</td>
</tr>
<tr>
<td>Landscaping</td>
</tr>
<tr>
<td>Lawn Care</td>
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<tr>
<td>Life Insurance</td>
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<tr>
<td>Med. insurance</td>
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<tr>
<td>Med. Power of atty.</td>
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<tr>
<td>Medical Clinic</td>
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<tr>
<td>Pension Fund</td>
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<tr>
<td>Pharmacy</td>
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<tr>
<td>Plumbing</td>
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<tr>
<td>Power of attorney</td>
</tr>
<tr>
<td>Snow Removal</td>
</tr>
<tr>
<td>Tax Preparation</td>
</tr>
<tr>
<td>Veterinarian</td>
</tr>
<tr>
<td>Other:</td>
</tr>
<tr>
<td>Other:</td>
</tr>
<tr>
<td>Other:</td>
</tr>
</tbody>
</table>

---

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---

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**
- Plan, schedule, invite, decorate, purchase gifts, food, planning, shopping, get tickets, etc.
- Birthdays
- Graduations
- Weddings
- Anniversaries
- Mother’s Day
- Memorial Day
- Father’s Day
- Sports events
- Family reunions
- Independence Day (July 4th)
- Labor day
- Thanksgivings
- Christmases
- Hunting/fishing
- New Year’s
- Super Bowls
- Coming travel/trips
- Date nights
- Holiday get togethers

**CHILDREN**
- Sports
- Music
- Extracurricular activities/clubs
- Camps/Retreats
- Lessons/Classes

**Hose/sprinkler system**
- Outdoor furniture
- Pantry – clean out old food
- Tighten cabinet knobs
- Oil hinges/locks/springs
- Thermostat/settings
- Planting/gardening

**INTERIOR/exterior painting**
- Fences/gates
- Sports equipment
- Pool maintenance
- Phones/long distance service
- Computers/networks
- Electronics/TV/Cable/Internet

**Financial**
- Dentist/doctor appointments
- Training/seminars/classes
- Investment planning
- Financial goals/plans/budgets
- Religious giving
- Year-end giving
- Regular Christian giving

**VEHICLES/engines**
- Oil changes
- Routine maintenance
- Tires
- Inspection/tune-up
- Brakes
- Exhaust
- Body work
- Motorcycle/ATV/RV/Boats

**Other**
- Pool maintenance
- Sports equipment
- Fences/gates
- Interior/exterior painting
- Fences/gates
- Sports equipment
- Pool maintenance
- Phones/long distance service
- Computers/networks
- Electronics/TV/Cable/Internet

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# 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.

<table>
<thead>
<tr>
<th>Documents</th>
<th>Physical Location of Originals (and/or name of hard drive location of computer file)</th>
<th>Location of copies (if applicable) or names of people who have copies with date given</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 Wishes Document <em>(if applicable)</em> <a href="http://www.agingwithdignity.org">www.agingwithdignity.org</a> <em>(See page 30)</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>This “Legacy Organizer” manual</td>
<td></td>
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<tr>
<td>Automobile Titles</td>
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<tr>
<td>Birth Certificates or Adoption papers</td>
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<td>Business Agreements</td>
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<td>Business or Partnership agreements</td>
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<td>Citizenship Papers</td>
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<td>Death Certificates</td>
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<td>Debt/Loan Certificates</td>
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<td>Deeds</td>
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<tr>
<td>Disability Insurance Policies</td>
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<tr>
<td>Divorce/Separation Papers <em>(if applicable)</em></td>
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<tr>
<td>Employee Life Insurance Policies</td>
<td></td>
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<tr>
<td>Financial account numbers</td>
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<td>Financial/Bank/inv. Statements</td>
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<td>Funeral instructions</td>
<td></td>
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<tr>
<td>Home &amp; vehicle Insurance Policies</td>
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<td>Leases</td>
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<td>Life Insurance Policies</td>
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<tr>
<td>Marriage Certificates</td>
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<tr>
<td>Medical Power of attorney</td>
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<tr>
<td>Memos/instructions about distribution of personal, sentimental, or heirloom possessions</td>
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<tr>
<td>Military Discharge Papers</td>
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<td>Mortgages</td>
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<td>Partnerships</td>
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<td>Passports</td>
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<td>Past income Tax returns</td>
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<td>Personal address book</td>
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<td>Personal Financial Statement</td>
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<td>Power of attorney</td>
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<td>Pre-paid funeral arrangements</td>
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<td>Power of Attorney</td>
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<td>Recreation</td>
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<tr>
<td>Retirement</td>
<td></td>
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<tr>
<td>Social Security Cards &amp; Benefits*</td>
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<tr>
<td>Stock Certificates/Bonds</td>
<td></td>
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<tr>
<td>Wills/Trusts/estate Plans</td>
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<td>Other:</td>
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<tr>
<td>Safe Deposit Box Info <em>(if applicable)</em></td>
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</tbody>
</table>

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.

* www.MyFamilyForms.org
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  T

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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 household items (for insurance purposes in case of fire, etc.):
- Other:

LOCAtION OF KEYS Or COMBINATION LOCK NUMBERS (xx-xx-xx) Or SECURITY CODES:

- Alarm/Security/Fire system: Name of company: Phone:
- Vehicles:
- Exterior house doors:
- Interior house doors:
- Garage:
- Cabin/vacation home:
- Lawn mower or yard equipment:
- Snow blower:
- Boat:
- Boat trailer:
- Motorcycle/atv:
- RV or trailer:
- Gun cabinet:
- Gun trigger locks:
- Boat house:
- Storage shed:
- Location of Safe:
- Key location or combination:
- Location of Fireproof lock box:
- Key location or combination:
- Electronic entry gates:
- Bicycle locks:
- Television satellite or cable security codes:
- Combination Lock for: #'s: - Combination Lock for: #'s: - Combination Lock for: #'s: - Other:

OTHER:

COMPUTERS

- Location of computer hub:
- Security code to access internet wi-fi:
- Location of internet modem:
- Location of computer software programs/CD's:
- Location of computer hardware owner's manuals and operating CDs:
- Computer #1: account name: Password:
- Computer #2: account name: Password:
- Computer #3: account name: Password:
- Email address: Login: Password:
- Email address: Login: Password:
- Email address: Login: Password:
- Other:

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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.

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

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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.

Step 1
☑ Check any item that is a source of God-given cash flow or income that you normally receive over a 12 month period.

Step 2
Determine an approximate “financial value” ($ amount) that this item represents in your life. Indicate the frequency of how often you receive these funds:

- W (Weekly) — 2x a month
- B (Bi-weekly) — 2x a month
- M (Monthly) — 1x a month
- Q (Quarterly) — 1x a quarter
- Y (Yearly) — 1x a year
- S (Sporadically) — Sporadically
- O (One-time) — One-time amount

Step 3
Indicate the percentage (%) you have prayerfully decided you will normally give to honor the Lord from whatever God-given resources He has provided for you.

Normal Cash & Income Over 12 Months

| Income, wage or salary from: |
| Income, wage or salary from: |
| Income, wage or salary from: |

Overtime pay
Bonuses
Tax returns/refunds
Commissions
Business income
Severance pay
Part-time work or moonlighting
Consulting fees
Sale of products or assets
Home-based business or services
Sale of stuff I/we own
Workmen’s Compensation
Honorariums
Social Security
Pension income
Military pay or pension
Annuity
Union pay or pension
Disability income
Unemployment or workmen’s compensation
Spousal or child support
Trust fund
Inheritance monies
Insurance settlement
Legal settlement
Income from rental or leased properties
Interest and/or dividends
Repayment of personal loans
Royalties from copyrights/patents
Rebates/Refunds/Returns/Coupons
Government welfare, food stamps, etc.
Other:

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Step 1

As best as you can, estimate how much money you are spending on a “monthly basis” in each area listed on the next page (Helpful hint: Take ANY quarterly, yearly, sometimes and one-time expenses and prorate this amount on a monthly basis).

HELPFUL NOTE: If you would like to find out how your spending compares to recommended national budget averages, visit: www.crown.org and click on tools and their budget guide calculator.

## LIFESTYLE EXPENSES

*Money talks: It says, “Good bye!” Where is your money going?*

### Step 2

Prayerfully review the list. Are there any items the Lord may be showing you that you could eliminate or modify to become more generous and/or to eliminate any indebtedness:

- You don’t really “need” and could eliminate from your spending?
- You could meet this need more affordably by shopping around or by lowering your expectations?
- You should decrease or eliminate because you realize this expenditure is hurtful to your personal health OR to your spiritual growth and service?
- You could postpone or trust God to meet this need in another way?

### Step 3

Based on items you identified in step 2, determine any increased amount you could give to the Lord monthly to meet a special need or giving opportunity ($________/month for increased giving) and/or to eliminate any indebtedness ($________/month for paying off debt).

---

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

<table>
<thead>
<tr>
<th>Today's Date: <strong>/_/20</strong></th>
<th>Lender</th>
<th>Account #</th>
<th>Phone #</th>
<th>Total Balance</th>
<th>Minimum Payment</th>
<th>% Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample</td>
<td>First Bank VISA</td>
<td>3456-7891-0123-4567</td>
<td>303-555-1234</td>
<td>$3211</td>
<td>$125</td>
<td>18%</td>
</tr>
<tr>
<td>Mortgage 1</td>
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<td>Mortgage 2</td>
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<td>Furn/Appliance</td>
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<tr>
<td>Personal Loan</td>
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<tr>
<td>Personal Loan</td>
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<tr>
<td>Business Loan</td>
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<tr>
<td>Business Loan</td>
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<tr>
<td>IRS/Taxes</td>
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<tr>
<td>Other</td>
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<tr>
<td>Other</td>
<td></td>
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</tr>
</tbody>
</table>

PREVIEW PAGE

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- **Non-Religious Version Available** – Go to www.MyFamilyForms.org for details

www.MyFamilyForms.org
Toll-free 866.935.5884 Phone: 719.302.3383
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. Pray responsibly and sincerely 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

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**CHRISTIAN AND CHARITABLE GIVING**

Identify: “What ministries, projects, programs, and people do you care about and want to support?”

“You are generous because of your faith. And I am praying that you will really put your generosity to work, for in so doing you will come to an understanding of all the good things we can do for Christ.” Philemon 5-7

<table>
<thead>
<tr>
<th>Ministries &amp; Charities You Support:</th>
<th>Support in the past 12 months</th>
<th>If desired, Special Gift within 1-5 years?</th>
<th>If desired, $ or % to include in will?</th>
</tr>
</thead>
</table>

**Step 1** Identify the Christian ministries and charities you are currently supporting or would like to support (see ministries list below.)

**Step 2** After prayer, circle any existing ministry you support OR a new ministry opportunity that could best utilize your increased or sacrificial support.

**Step 3** Determine priorities, and believe God wants you to give to the Lord’s work (specific church) in the next few years.

**Step 4** Determine end-of-life gifts (percentages or amounts) you feel God wants you to give to within the next few years.

**SUGGESTION:** If you give 10% or more to the Lord’s work, consider tithing your normal expected income (your main income source) to your local church. Then consider giving 10% or more from all your other income sources to support other ministries.

**TYPES OF CHURCH AND CHARITABLE ORGANIZATIONS:**

- **CHURCH:** Pastoral staff, missions, benevolence, youth, women, men, adult, worship, facilities, media, denominations, etc.
- **BUILDINGS & EQUIPMENT:** New facilities, relocation, expansion, renovations, vehicles, computers, program equipment, etc.
- **NEEDY:** Widows, homeless, urban ministries, crisis pregnancy, prisoners, refugees, relief, orphans, rescue missions, disabled, scholarships, etc.
- **EDUCATION:** Schools, colleges, universities, seminaries, etc.
- **CULTURAL/ARTS/WORSHIP/MUSIC.

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Toll-free 866.935.5884 Phone: 719.302.3383

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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 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

- Solution for Better Aging  www.agenet.org

- Servants on Wheels  www.workersonwheels.com

- Social Security Administration  www.socialsecurity.gov

- Well Spouse Foundation  www.wellsouse.org  Support to partners of the chronically ill and/or disabled.

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### FAMILY MEDICAL INFORMATION

<table>
<thead>
<tr>
<th>Insurance (company, policy number, phone number):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location of insurance cards (wallet/s, desk drawer or?)</td>
</tr>
<tr>
<td>Medicaid/Medicare info:</td>
</tr>
<tr>
<td>Location of organ donor card/instructions/permissions:</td>
</tr>
<tr>
<td>Prescription/Dental/Vision:</td>
</tr>
<tr>
<td>Doctors/Dentist/Etc. (name, specialty, phone number):</td>
</tr>
</tbody>
</table>

### MEDICAL HISTORY

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

<table>
<thead>
<tr>
<th>Heart disease:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stroke:</td>
</tr>
<tr>
<td>Cancer (specific type/s):</td>
</tr>
<tr>
<td>Depression/suicide:</td>
</tr>
<tr>
<td>Diabetes:</td>
</tr>
<tr>
<td>High cholesterol:</td>
</tr>
<tr>
<td>High blood pressure:</td>
</tr>
<tr>
<td>Miscarriages:</td>
</tr>
<tr>
<td>Infant/childhood deaths:</td>
</tr>
<tr>
<td>Allergies:</td>
</tr>
<tr>
<td>Amputations (reason):</td>
</tr>
<tr>
<td>Other:</td>
</tr>
<tr>
<td>Other:</td>
</tr>
</tbody>
</table>

### Immunization history

**Write names of family members and date(s) immunizations given (if known)**

<table>
<thead>
<tr>
<th>Hepatitis A:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hepatitis B:</td>
</tr>
<tr>
<td>Influenza:</td>
</tr>
<tr>
<td>MMR:</td>
</tr>
<tr>
<td>Pneumonia:</td>
</tr>
<tr>
<td>Meningitis:</td>
</tr>
<tr>
<td>Tetanus:</td>
</tr>
<tr>
<td>Chicken pox:</td>
</tr>
</tbody>
</table>

### Major surgeries

**Write person's name, type of surgery, year and/or approximate age at the time of surgery (if known)**

### Prescriptions

**Write person's name, doctor's name, name of medication, reason for medication (if known)**

---

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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 can’t make them yourself.
2. The kind of medical treatment you want or don’t want.
3. How comfortable you want to be.
4. How you want people to treat you.
5. What you want your loved ones to know.

What is the Five Wishes booklet?
The following information is from the Five Wishes website (www.agingwithdignity.org). Five Wishes is an easy-to-use legal document that lets you plan in advance for how you want to be cared for in case you become seriously ill. Some people refer to it as an “advance directive” because when you complete Five Wishes you give direction to your doctor and family, in advance, on how you want to be treated.

• Wish one lets you choose the person you want to make decisions for you when you can’t make them for yourself. Lawyers call it a “durable power of attorney for health care.”
• Wish two is a living will. It lets you put in writing the kind of medical treatment you want, or don’t want, if you become seriously ill and can’t communicate to anyone.
• Wishes three and four let you describe in detail how you want to be treated so that your dignity can be maintained.
• Wish five gives you a chance to tell others how you want to be remembered, and express other things that might be in your heart, like forgiveness.

Why should I fill out Five Wishes?
Without an advance directive like Five Wishes, you may have no control over important medical care decisions that will be made if you ever get seriously ill – such as whether to give you life-support treatment or aggressively treat your pain. Everyone has different wishes and yours won’t be followed unless you make them clear. Not expressing your wishes can put your family, friends and doctor in the difficult position of guessing what kind of treatment you want, which could lead to disagreements. Completing Five Wishes gives you control over your care and peace of mind for you and your loved ones.

When do I need to use Five Wishes?
The best time to fill out a document like this is before you face a health crisis. You never know when you are going to need Five Wishes, and many people put it off until it’s too late. If you are over age 18, you should complete the forms now. If you are married, you and your spouse each need to fill out your own Five Wishes document.

When does Five Wishes take effect?
You will always make your own health care decisions, if you are able to talk with your doctor and understand what is being said. Five Wishes only takes effect when you are too ill to communicate. So if you have a stroke and can’t speak, or are in a coma, then your Five Wishes and the person you chose to be your health care agent, can help direct your care with your doctor.

Is Five Wishes a legal document?
Yes. It was written with the help of the American Bar Association’s Commission 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
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 with God is not automatic because you by nature are separated from God. The Bible says, “For all have sinned and fall short of the glory of God.” Romans 3:23

3. God’s Remedy—The Cross
God’s love bridges the gap of separation between God and you. When Jesus Christ died on the Cross and rose from the grave, He paid the penalty for your sins. The Bible says, “He personally carried the load of our sins in his own body when he died on the cross...” 1 Peter 2:24

4. Our Response—Receive Christ
You can cross the bridge into God’s family when you receive Christ by personal invitation. The Bible says, “But as many as received Him, to them He gave the right to become children of god, even to those who believe in His name...” John 1:12

To receive Christ you need to do four things:
1) ADMIT your spiritual need. “I am a sinner.”
2) REPENT and be willing to turn from your sin.
3) BELIEVE that Jesus Christ died for you on the cross.
4) RECEIVE through prayer, Jesus Christ into your heart and life.

The Bible says (Christ is speaking), “Behold, i stand at the door and knock; if any man hears my voice, and opens the door, i will come in...” Revelation 3:20

“Everyone who calls on the name of the Lord will be saved.” Romans 10:13

Here is a suggested prayer for you to pray:
Dear Lord Jesus: Thank you for loving me. I know I am a sinner. I believe you died on the cross for my sins. Right now, I turn from my sins and open the door of my heart and life to you. I receive you as my personal Lord and Savior. Thank you for now saving me. Amen

I want my family and loved ones to know that I have prayed to receive Christ, and I have assurance that when I leave this world I will go to heaven to be with my personal Savior, the Lord Jesus Christ.

Man’s signature: __________________________________________ Date: __________

Woman’s signature: _________________________________________ Date: __________

For additional spiritual encouragement by Dr. Brian Kluth, you can listen to or watch his sermons posted on www.MyFamilyForms.org
# PERSONAL INFORMATION & FUNERAL PLANS (Man)

*Use additional paper if necessary*

<table>
<thead>
<tr>
<th>Full Name:</th>
<th>Social Security Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Birth (DOB):</td>
<td>Place of Birth:</td>
</tr>
<tr>
<td>Driver's License State/Number:</td>
<td></td>
</tr>
<tr>
<td>Full Name of Father:</td>
<td>Father's Birthplace:</td>
</tr>
<tr>
<td>Full Name of Mother:</td>
<td>Mother's Birthplace:</td>
</tr>
<tr>
<td>Siblings and their current location:</td>
<td></td>
</tr>
<tr>
<td>If married, Wedding Date:</td>
<td>Spouse's Maiden Name:</td>
</tr>
<tr>
<td>Child #1 Name:</td>
<td>DOB:</td>
</tr>
<tr>
<td>Child #2 Name:</td>
<td>DOB:</td>
</tr>
<tr>
<td>Child #3 Name:</td>
<td>DOB:</td>
</tr>
<tr>
<td>Child #4 Name:</td>
<td>DOB:</td>
</tr>
<tr>
<td>Occupations/Position -Title/Years:</td>
<td></td>
</tr>
<tr>
<td>Employers/Years:</td>
<td></td>
</tr>
<tr>
<td>Do you have any life insurance with an Accidental Death Benefit (which pays extra if you died accidentally)?</td>
<td></td>
</tr>
<tr>
<td>Grade School/s, Middle School/Jr. Highs/Cities:</td>
<td></td>
</tr>
<tr>
<td>High School(s)/City/Year Graduated:</td>
<td></td>
</tr>
<tr>
<td>College(s)/Universities/Years/Cities/Degrees/Majors:</td>
<td></td>
</tr>
<tr>
<td>Places lived in/years:</td>
<td></td>
</tr>
<tr>
<td>Military from ________to _______ in the (branch):</td>
<td>Rank:</td>
</tr>
<tr>
<td>Places served in Military:</td>
<td></td>
</tr>
<tr>
<td>Churches Attended/Cities/Years:</td>
<td></td>
</tr>
<tr>
<td>Professional Groups, Civic, Clubs, Lodges, Associations:</td>
<td></td>
</tr>
<tr>
<td>Closest friends:</td>
<td></td>
</tr>
</tbody>
</table>

## FUNeral PLANNING

Provide instructions, notes, name(s), addresses, phone numbers, emails, etc.

<table>
<thead>
<tr>
<th>Church/City:</th>
<th>Phone:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funeral Home/City:</td>
<td>If prepaid, account #:</td>
</tr>
<tr>
<td>Cemetery/City:</td>
<td>If purchased, what row #:</td>
</tr>
<tr>
<td>Casket or Urn Company:</td>
<td>If prepaid, account #:</td>
</tr>
<tr>
<td>Preferred Clergy:</td>
<td></td>
</tr>
<tr>
<td>Meal after funeral? Where?</td>
<td></td>
</tr>
<tr>
<td>Memorial Service (in another city?):</td>
<td></td>
</tr>
<tr>
<td>Obituaries (what cities?):</td>
<td></td>
</tr>
<tr>
<td>Preferred Pall Bearers:</td>
<td></td>
</tr>
<tr>
<td>Flowers? Or Memorials to?:</td>
<td></td>
</tr>
<tr>
<td>Special Songs Requested:</td>
<td></td>
</tr>
<tr>
<td>Special Scriptures:</td>
<td></td>
</tr>
<tr>
<td>Special Poems or Stories:</td>
<td></td>
</tr>
<tr>
<td>Preferred Singer/s:</td>
<td></td>
</tr>
<tr>
<td>Preferred Instrumentalist/s:</td>
<td></td>
</tr>
<tr>
<td>Preferred Speaker/s:</td>
<td></td>
</tr>
<tr>
<td>Should gospel (&amp;/or testimony) be shared?</td>
<td></td>
</tr>
<tr>
<td>Invitation for salvation given?</td>
<td></td>
</tr>
<tr>
<td>Instructions for choosing casket or urn:</td>
<td></td>
</tr>
<tr>
<td>Clothing or jewelry desires:</td>
<td></td>
</tr>
<tr>
<td>Grave marker choice:</td>
<td></td>
</tr>
<tr>
<td>Location of Will, Policies, etc.:</td>
<td></td>
</tr>
<tr>
<td>Viewing choice:</td>
<td></td>
</tr>
<tr>
<td>Burial/Cremation choice:</td>
<td></td>
</tr>
<tr>
<td>If casket, open or closed?</td>
<td></td>
</tr>
<tr>
<td>If cremated what to do with ashes?</td>
<td></td>
</tr>
<tr>
<td>Items for the memorial table:</td>
<td></td>
</tr>
<tr>
<td>Location of photos (computer files?)</td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td></td>
</tr>
</tbody>
</table>

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# PERSONAL INFORMATION & FUNERAL PLANS (Woman)

*Use additional paper if necessary*

<table>
<thead>
<tr>
<th><strong>Full Name:</strong></th>
<th><strong>Social Security Number:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date of Birth (DOB):</strong></td>
<td><strong>Place of Birth:</strong></td>
</tr>
<tr>
<td><strong>Driver's License State/Number:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Full Name of Father:</strong></td>
<td><strong>Father's Birthplace:</strong></td>
</tr>
<tr>
<td><strong>Full Name of Mother:</strong></td>
<td><strong>Mother's Birthplace:</strong></td>
</tr>
<tr>
<td><strong>Siblings and their current location:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>If married, Wedding Date:</strong></td>
<td><strong>Spouse's Maiden Name:</strong></td>
</tr>
<tr>
<td><strong>Child #1 Name:</strong></td>
<td><strong>DOB:</strong></td>
</tr>
<tr>
<td><strong>Child #2 Name:</strong></td>
<td><strong>DOB:</strong></td>
</tr>
<tr>
<td><strong>Child #3 Name:</strong></td>
<td><strong>DOB:</strong></td>
</tr>
<tr>
<td><strong>Child #4 Name:</strong></td>
<td><strong>DOB:</strong></td>
</tr>
<tr>
<td><strong>Occupations/Position - Title/Years:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Employers/Years:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Do you have any life insurance with an Accidental Death Benefit (which pays extra if you died accidentally)?</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Grade School/s, Middle School/Jr. Highs/Cities:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>High School(s)/City/Year Graduated:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>College(s)/Universities/Years/Cities/Degrees/Majors:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Places lived in/years:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Military from ________to _______ in the (branch):</strong></td>
<td><strong>Rank:</strong></td>
</tr>
<tr>
<td><strong>Places served in Military:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Churches Attended/Cities/Years:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Professional Groups, Civic, Clubs, Lodges, Associations:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Closest friends:</strong></td>
<td></td>
</tr>
</tbody>
</table>

## FUNERAL PLANS

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- **Microsoft Word and Adobe PDF computer files** - **$4.95 to $19.95** *(files sent by email)*
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**www.MyFamilyForms.org**

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

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 them. To be a legally binding document, it will be important to provide this information to the person who draws up your will or estate plans, so they can include this information as part of your official wishes.

<table>
<thead>
<tr>
<th>Description and Location of Item</th>
<th>Person/relationship or Ministry/Organization P or S</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special collections</td>
<td></td>
</tr>
<tr>
<td>Jewelry</td>
<td></td>
</tr>
<tr>
<td>Instruments</td>
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<td>Certain articles of clothing</td>
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<td>Handmade items</td>
<td></td>
</tr>
<tr>
<td>Travel artifacts</td>
<td></td>
</tr>
<tr>
<td>Family heirlooms</td>
<td></td>
</tr>
<tr>
<td>Dishes</td>
<td></td>
</tr>
<tr>
<td>Silverware</td>
<td></td>
</tr>
<tr>
<td>Kitchenware</td>
<td></td>
</tr>
<tr>
<td>Books</td>
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<td>Electronics</td>
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<tr>
<td>Furniture</td>
<td></td>
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<tr>
<td>Vehicles</td>
<td></td>
</tr>
<tr>
<td>Antiques</td>
<td></td>
</tr>
<tr>
<td>Craft items</td>
<td></td>
</tr>
<tr>
<td>Pictures or Photographs</td>
<td></td>
</tr>
<tr>
<td>Tools</td>
<td></td>
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<td>______________</td>
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</table>

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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:
   
   - $1 = Would really like
   - $2 = Would be willing to take
   - $3 = No interest

E. Then have the executor of the estate, or a trusted family member, seek to equally divide up the number of #1's or #2's each family member receives. Distribute unwanted items to charity.

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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
- Professional organizations
- Alumni associations
- Company newsletters
- Current town/city newspapers
- Past town/city newspapers
- Fraternal Organizations
- Professional journals/magazines/newsletters
- Alumni magazines
- Past town/city newspapers

Notice of my homegoing, funeral plans, and/or copies of my obituary should be sent to the following:

**PREVIEW PAGE**

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Toll-free 866.935.5884  Phone: 719.302.3383
## 40+ Things to Do After a Loved One Dies

<table>
<thead>
<tr>
<th>Date</th>
<th>Items a Spouse, Family Member(s) or Executor Needs to Review and Act Upon (As Applicable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Make sure the person's organ donation wishes are followed.</td>
</tr>
<tr>
<td>2.</td>
<td>Contact funeral home <em>(if applicable, have prepaid funeral plans or life insurance information available).</em></td>
</tr>
<tr>
<td>3.</td>
<td>Contact clergy and/or church.</td>
</tr>
<tr>
<td>4.</td>
<td>Locate address book and notify family and friends <em>(by phone and/or e-mail).</em></td>
</tr>
<tr>
<td>5.</td>
<td>Place obituary(s).</td>
</tr>
<tr>
<td>6.</td>
<td>Contact Veterans Administration <em>(Military honors for funeral and death benefits).</em></td>
</tr>
<tr>
<td>7.</td>
<td>Conduct viewing and/or service(s).</td>
</tr>
<tr>
<td>8.</td>
<td>Order an adequate number of death certificates from the funeral home <em>(at least 10-15).</em></td>
</tr>
<tr>
<td>9.</td>
<td>Locate will, trusts, important papers/documents/statements/memos/deeds/titles.</td>
</tr>
<tr>
<td>10.</td>
<td>Have an autoresponder setup on a person's e-mail address. After several months, delete e-mail address.</td>
</tr>
<tr>
<td>11.</td>
<td>If applicable, become part of a grief support group or identify someone(s) who can journey with you through the grieving and adjustment process.</td>
</tr>
<tr>
<td>12.</td>
<td>Give charitable gifts or establish scholarship accounts in loving memory of the person that passed away.</td>
</tr>
<tr>
<td>13.</td>
<td>Have executor transfer assets and inheritances to heirs and beneficiaries.</td>
</tr>
<tr>
<td>14.</td>
<td>Locate previous tax records. File federal and state taxes for the year the person passed away.</td>
</tr>
<tr>
<td>15.</td>
<td>Notify any creditors and mortgage companies <em>(Note: See if any loans were insured. For example, the person may have had coverage through medical coverage into the name of the spouse).</em></td>
</tr>
<tr>
<td>16.</td>
<td>Finalize hospital bills, doctor bills, nursing home accounts.</td>
</tr>
<tr>
<td>17.</td>
<td>Notify company(s) holding pension account(s) and apply for benefits.</td>
</tr>
<tr>
<td>18.</td>
<td>Notify any provider of income source(s) about the person's death.</td>
</tr>
<tr>
<td>19.</td>
<td>Notify company(s) holding annuity account(s).</td>
</tr>
<tr>
<td>20.</td>
<td>Notify the Social Security Department and apply for benefits.</td>
</tr>
<tr>
<td>21.</td>
<td>Gather unpaid bills you find or that come in the mail. Organize the information for payment from the estate.</td>
</tr>
<tr>
<td>22.</td>
<td>Notify the motor vehicle department.</td>
</tr>
<tr>
<td>23.</td>
<td>Notify stock brokerage houses and investment companies where the person had accounts.</td>
</tr>
<tr>
<td>24.</td>
<td>Notify the motor vehicle department and change titles for vehicles, boats, recreation vehicles.</td>
</tr>
<tr>
<td>25.</td>
<td>Notifyany union, professional, religious, or fraternal organizations or associations to which the person belonged.</td>
</tr>
<tr>
<td>26.</td>
<td>Change all jointly held accounts, investments, mortgages.</td>
</tr>
<tr>
<td>27.</td>
<td>If applicable, reestablish title/ownership of Safe Deposit Box.</td>
</tr>
<tr>
<td>28.</td>
<td>Notify bank(s) or credit union(s) and change account information.</td>
</tr>
<tr>
<td>29.</td>
<td>Distribute any memorial gifts or charitable gifts to church, ministries, missionaries or non-profit organizations.</td>
</tr>
<tr>
<td>30.</td>
<td>Get help going through a person's personal belongings—identify items you will keep, items you will give away (by church, Christian organization or a local charity) for their use or resale.</td>
</tr>
<tr>
<td>31.</td>
<td>Review bank records and cancel automatic withdrawals related specifically to the deceased.</td>
</tr>
<tr>
<td>32.</td>
<td>If applicable, apply for Veterans Administration benefits. <a href="http://www.va.gov">www.va.gov</a></td>
</tr>
<tr>
<td>33.</td>
<td>Review mail and cancel subscriptions and reoccurring charges <em>(cell phone, etc.)</em></td>
</tr>
<tr>
<td>34.</td>
<td>Notify credit card companies <em>(apply for any possible life insurance benefits that might exist on the account).</em></td>
</tr>
<tr>
<td>35.</td>
<td>Notify the post office.</td>
</tr>
<tr>
<td>36.</td>
<td>Notify motor vehicle departments.</td>
</tr>
<tr>
<td>37.</td>
<td>Notify stock brokerage houses and investment companies where the person had accounts.</td>
</tr>
<tr>
<td>38.</td>
<td>Notify any provider of income source(s) about the person's death.</td>
</tr>
<tr>
<td>39.</td>
<td>Notify company(s) holding pension account(s) and apply for benefits.</td>
</tr>
<tr>
<td>40.</td>
<td>Notify the Social Security Department and apply for benefits.</td>
</tr>
<tr>
<td>41.</td>
<td>Write thank you notes for food, flowers, memorials, people who assisted in the service(s), etc.</td>
</tr>
<tr>
<td>42.</td>
<td>Distribute personal possessions <em>(as recorded in this booklet, will, or estate papers)</em></td>
</tr>
<tr>
<td>43.</td>
<td>Review will, trust, estate, and probate information with executor and/or attorney.</td>
</tr>
</tbody>
</table>

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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 your entire estate to your spouse or having all assets in joint ownership with your spouse:** For some this may be a good plan, for others it might be the wrong thing to do. Poor planning can result in substantial and unnecessary federal estate taxes or probate expense upon the death of the surviving spouse.

6. **Not understanding estate taxes:** Estate taxes may be considerably reduced or avoided with proper planning.

7. **Not using the annual gift tax exclusion:** This is a good way to enjoy sharing your estate with loved ones and individuals now. It may also help reduce future estate taxes. As of 2008 you can give $12,000/person.

8. **Keeping life insurance in your estate:** Life insurance will be considered part of your taxable estate unless you take steps to avoid this potential estate tax liability.

9. **Failing to keep good records:** All of your financial assets, accounts, wills, trusts, capital improvements, insurance policies, etc., should be up-to-date and easy to find. You should tell someone you trust where to find these important records.

10. **Failing to include God’s work in your estate plan:** Have you considered leaving part of your estate to God’s work? The government supports your decision to include Christian causes in your estate plan, and such gifts can help reduce your taxes now and later.

---

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There are only three places to distribute your estate: family/friends, ministry/charity, or the government. If you don’t do some basic planning, the government may get more than you ever intended, your family may be left confused, angry or short-changed, and God’s work will get nothing.

WHEN should you consider changing or updating your existing will, trust, living will, estate, or charitable giving plans?

- You need to change your estate executor, personal representative, power of attorney, or medical power of attorney because you have changed your mind, the person has died, or the selected person cannot fulfill this role.
- Additional children have been born or adopted, or your choice(s) of guardians has changed for underage children.
- 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.
- You have moved to a different state or have purchased real estate in a different state.
- Your financial affairs and assets have changed.
- You desire to make a significant charitable gift to a church, ministry, or non-profit organization.
- A beneficiary has died.
- Tax laws have changed that will impact your estate.
- Professional advisors have shown you ways to restructure your estate plans to decrease your tax liability and increase the amount you can leave to children, church, Christian ministries, or charities.
- Your attorney, accountant, or estate planner has advised you that changes are necessary.
- 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.
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
• Eccl. 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 5:11-13 This is the testimony: God has given us eternal life, and this life is in his Son. He who has the Son has life; he who does not have the Son of God does not have life. I write these things to you who believe in the name of the Son of God so that you may know that you have eternal life.
• John 3:3 Jesus declared, “I tell you the truth, no one can see the kingdom of God unless he is born again.”

2. Get your final wishes in order (medical/health care directives)
• Prov. 27:12 A sensible man watches for problems ahead and prepares to meet them. The simpleton never looks and suffers the consequences. TLB
• 2 Cor. 5:1-4 We know that when this tent we live in now is taken down—when we die and leave these bodies—we will have wonderful new bodies in heaven, homes that are ours forever more, made for us by God himself and not by human hands. (See also: Luke 15:11-24 Prodigal son).
• Prov. 17:16 What use is money in the hand of a fool, since he has no desire to get wisdom.
• Prov. 19:14 Houses (=a place to live) and wealth (=enough stuff for the place you live) are inherited from parents, but a prudent wife is given by God.

3. Get your finances in order
• Prov. 27:23-24 Riches can disappear fast. And the king's crown doesn't stay in his family forever—so watch your business interests closely. Know the state of your flocks and herds. TLB
• Prov. 3:9 Honor the Lord with your capital (wealth, riches, goods, possessions, substance) and sufficiency from righteous labors and with the first fruits of all your income (revenues, increase, fruit, produce). AMP
• Deut. 16:17 Each of you must bring a gift in proportion to the way the Lord your God has blessed you.

4. Get your family affairs in order
• Prov. 13:22 A good man leaves an inheritance for his children's children.
• Prov. 20:21 An inheritance quickly gained at the beginning will not be blessed at the end. (See also: Luke 15:11-24 Prodigal son).
• Prov. 17:16 What use is money in the hand of a fool, since he has no desire to get wisdom.
• Prov. 19:14 Houses (=a place to live) and wealth (=enough stuff for the place you live) are inherited from parents, but a prudent wife is given by God.

5. Get your funeral celebration in order
• 1 Thess. 4:13-14 Brothers, we do not want you to be ignorant about those who fall asleep, or to grieve like the rest of men, who have no hope. We believe that Jesus died and rose again and so we believe that God will bring with Jesus those who have fallen asleep in him.

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.
1. Recognize the certainty of your departure from this world and the need to get your house in order

- **Isaiah 38:1** This is what the LORD says: “Put your house in order, because you are going to die.”
  Also look up: Eccl. 5:15, Prov. 27:12, Eccl. 9:12, Ps. 39:5-6, Eccl. 5:19-20, Eccl. 4:7-8, Eccl. 6:1-2.

2. Recognize the certainty of judgment to come and the opportunity for eternal life vs. eternal punishment

- **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 5:11-13** This is the testimony: God has given us eternal life, and this life is in his Son. He who has the Son has life; he who does not have the Son of God does not have life. I write these things to you who believe in the name of the Son of God so that you may know that you have eternal life.

3. Recognize the need to honor the Lord from whatever resources he has entrusted to you while you are living ANIL

- **Deut. 8:17-18** You may say to yourself, “My power and the strength of my hands have produced this wealth for me.” But remember the LORD your God, for it is he who gives you the ability to produce wealth.
- **Prov. 3:9** Honor the Lord with your capital (wealth, riches, goods, possessions, substance) and sufficiency from righteous labors and with the first fruits of all your income (revenues, increase, fruit, produce). AMP
- **Deut. 16:17** Each of you must bring a gift in proportion to the way the LORD your God has blessed you.

**RECOMMENDATION:**
Remember your church, Christian ministries, and/or charitable interests in your will.

**IMPORTANT NOTE:**
Many standardized attorney or will forms do NOT ask about your Christian or charitable interests. This is something you must personally and intentionally insert into your will.

**Here is sample wording from our estate plans:**

“Seven months after our death, the financial net assets are to be distributed as follows:

10% to our current local church
5% to Fort Wilderness Ministries in Mcnaughton, WI
3% to Samaritan’s Purse in Boone, NC
2% to Gospel for Asia in Plano, TX
remainder to be distributed as instructed or to be put into trust(s) for our children.”

4. Be aware of the pitfalls of giving an inheritance all at once (at death or before death)

- **Prov. 20:21** An inheritance quickly gained at the beginning will not be blessed at the end.
- **Luke 15:11-24** The story of the prodigal son and his demanding an earlier inheritance.

**SUGGESTION:**
Divide up inheritance distributions over three (3) or more time periods.

**Here is sample wording from our estate plans:**

“Estate distributions to our children: 10% at age 23, 30% at age 27 and 60% at age 31. From each child’s portion of the estate, the trustee is to allow for monthly living, education, activities, and medical expenses for each child until they are 23. Each child is to go to their choice of a Torchbearer’s Bible college for 1 year following their high school graduation before receiving funding towards their college education, vocational training, or business endeavors.”

5. Consider wealth sharing before your death for special purposes

- **Prov. 19:14** Houses (a place to live) and wealth (enough stuff for the place you live) are inherited from parents, but a prudent wife is from the LORD.
- **Prov. 13:22** A good man leaves an inheritance for his children’s children.

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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

- Proverbs 17:16 What use is money in the hand of a fool, since he has no desire to get wisdom?
- Proverbs 17:2 A wise servant will rule over a disgraceful son as if he were the father
- Job 42:15 Nowhere in all the land were there found women as beautiful as Job’s daughters, and their father granted them an Heirship along with their brothers.
- Luke 9:25 What profit is it to a man if he gains the whole world, and is himself destroyed or lost? NKJV

7. Be wise in naming guardians for minor children. Choose people that will honor your Christian beliefs and values

- Proverbs 22:6 Train a child in the way he should go, and when he is old he will not turn from it.
- Deuteronomy 6:6-9 These commandments that I give you today are to be upon your hearts. Impress them on your children. Talk about them when you sit at home and when you walk along the road, when you lie down and when you get up. Tie them as symbols on your hands and bind them on your foreheads. Write them on the door frames of your houses and on your gates.

8. Research and receive professional counsel on appropriate legal ways to lay up for yourselves more treasure in heaven

- Matthew 6:19-21 (Jesus said) “Do not store up for yourselves treasures on earth, where moth and rust destroy, and where thieves break in and steal. But store up for yourselves treasures in heaven, where moth and rust do not destroy, and where thieves do not break in and steal. For where your treasure is, there your heart will be also.”
- 1 Timothy 6:17-19 Command those who are rich in this present world not to be arrogant nor to put their hope in wealth, which is so uncertain, but to put their hope in God, who richly provides us with everything for our enjoyment. Command them to do good, to be rich in good deeds, and to be generous and willing to share. In this way they will lay up treasure for themselves as a firm foundation for the coming age, so that they may take hold of the life that is truly life.

9. Be wise in your distribution of personal possessions

- Proverbs 27:12 A sensible man watches for problems ahead and prepares to meet them. The simpleton never looks and suffers the consequences. TLB

On pages 35 and 36 of this booklet, you will find forms which will allow you to provide a clear and equitable distribution of your personal possessions. When your personal possessions are distributed after your death, the following possible distribution levels can be used:

Distribution 1: Any items indicated on page 35 of this booklet are to be distributed.

Distribution 2: Each child is to fill out their list and return their form (See page 36) within 48 hours to the Personal Representative. The Personal Representative will then seek to, as much as possible, fairly distribute the personal property.

Distribution 3: A similar list of remaining items can then be given to (indicate names of specific relatives or friends.)

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

For 50+ “Financial Funnies” cartoons by Brian Kluth, go to: www.Kluth.org/cartoons.htm

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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.

GUARDIAN CHOICES FOR CHILDREN

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

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Preview Page
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 grandchildren) to come to the realization that they need to schedule a time to meet with their aging parents to go over a number of important items together, or having outside professional counsel or trusted family friends to help plan and guide a family meeting.

Suggestions for the type of things that could be covered or included in one or more family meetings:

1. Take turns to express love and appreciation for each other.
2. Recall and share positive stories or life changing memories/moments with each other.
3. Reflect on the character qualities, personal attributes, and positive strengths of each other.
4. Ask or answer some key questions from the LEGACY ORGANIZER 100 questions (see pages 1-4).
5. Identify and ask for forgiveness for any specific wrongs that have been done in the past.
6. Have the parent(s) express their wishes for their children's and grandchildren's futures.
7. Talk about future housing plans/needs and timing (i.e. transitioning from a house to an apartment/townhome/condo, retirement community, living with adult children or sibling, assisted living, etc.) and transportation plans (when it will be necessary to stop driving, who can help drive to appointments, etc.).
9. Review and discuss in detail the financial picture - current and future (see pages 13-18). Decide who will have power of attorney, access to financial accounts, and/or check writing authority.
10. Go over health insurance coverage and end of life medical wishes (see page 21).
11. Go over spiritual issues related to the future (see page 22).
12. Share with your family when and how you became a Christian, what Christ means to you, and your assurance that you know where you are going when you leave this earth. Express your desire for each of them to also come to have a personal faith in Christ.
13. Share and discuss funeral plans and wishes (see pages 23-27).
14. If applicable, family business issues and planning for the future.
15. Share key aspects of the estate plans: Christian/charitable giving decisions and wishes, how will the estate finances be handled and divided up, who is the executor or trustee (why?), specific instructions on how assets and possessions are to be handled and divided up, where are key documents located, and any other questions.
16. Determine if there is a specific family member that can assist in helping to fill out many of the helpful forms associated with the LEGACY ORGANIZER.
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

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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 had 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 will direct your estate, as well as deciding what to do with your money and property, and planning the timing of the needed transfers.

Here is a list of some common estate planning tools:

Bequests
A bequest through a will or her living trust, an individual can leave money or property to their family member, friend, church, or charity. It is often more desirable than naming a beneficiary of a will or trust.

Life Estate Gift
A Life Estate Gift allows you to retain lifetime enjoyment of the property. At the person’s death, the property becomes the immediate property of the church or ministry. The church or ministry may decide to keep the home for use by pastoral staff or visiting missionaries, or ministry expansion. An irrevocable Life Estate Gift will generate a tax-deductible gift based on the “remainder interest” the person holds in the property. This value is determined according to government tables and the person’s age. This amount may be claimed as a deduction for Federal Income Tax purposes in the year the agreement is completed. This arrangement removes the property from the estate, and it will not be subject to either probate or the Federal Estate Tax.

Life Insurance Gifts
Life insurance is one way of making a larger gift than a person may be able to make otherwise. This gift option is available as a charitable gift deduction or as a charitable remainder unitrust. The Federal Estate Tax and Federal Gift Tax are tax-deductible gifts. The insured party may be paid-out or wait until it receives the death benefits. Another option is to encourage people to add their church or a ministry as one of the beneficiaries of their will or living trust. They do this by changing their beneficiary designations.

Charitable Remainder Trusts
Charitable Remainder Trusts (CRTs) are gift options that provide income during the life of the person, and upon death, the remaining income is paid to the church or charity. CRTs are available for the Federal Estate Tax, Federal Gift Tax, and Federal Income Tax. A Charitable Remainder 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.

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Adapted from materials by Dick Edic of www.VisionResourcingGroup.com
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 over the life expectancy of the annuitant. If the annuitant dies before the annuity is exhausted, all funds available for the future payments will not be subject to the Federal Estate Tax. The Gift Annuity Agreement and Deferred Gift Annuity Agreement are less complicated than their own annuity plans for churches and Christian Community Foundations. Seek professional services.

Living Trust is a bequest, just like in a will. Assets in the trust are distributed according to the terms of the trust and do not pass through the probate process. These assets will avoid the Federal Estate Tax when transferred to a qualified charity.

Naming a church, Christian ministry, or charity as beneficiary would be one example. In a banking situation, this is often known as a Pay on Death (or POD) account. Some institutions may refer to this arrangement as Transfer on Death (or TOD). These arrangements allow for the assets to pass directly to the named beneficiary and avoid the will process.

Retirement funds can be set up so that members can make current or deferred gifts into the endowment or scholarship fund knowing that it will annually give from the earnings of the investment portfolio in the fund. These funds can produce an economic “hedge” against hard times.

Endowment or Scholarship Funds can be set up so that members can make current or deferred gifts into the endowment or scholarship fund. These funds can produce an economic “hedge” against hard times.

Automatic Transfers can be used to make gifts to a church, ministry, or charity as beneficiary of any account that allows such a designation. A checking account or savings account allows the owner to name a beneficiary, or beneficiaries. At the death of some high wealth individuals, there may be two taxes. Taxes can be avoided if the “secondary” beneficiary is a qualified charity. This is “win-win” because family members would end up inheriting the real estate, capital gains and other assets, and the charity is usually not subject to probate. Individuals, like the deferred retirement income plan, can name a beneficiary as “house,” like the living trust, and then, death and inheritance tax. Also, the “house” is not subject to probate or the Federal Estate Tax.

Outright Gifts are the simplest gift. Such gifts might include real estate, personal property, or cash. Outright gifts often require some form of legal advice. The tax-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 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.

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ADDITIONAL RESOURCES

Resources for your personal finances

• 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-Fisted World
• www.generosityPledge.org Movement and other resources to help you become more generous
• www.generosityPledge.org Movement
• Generosity Pledge's 30 day devotional on the 7 Keys to Open-Handed Living in a Tight-Fisted World
• The generosity pledge
• National Christian Foundation: www.NationalChristian.com or 800-681-6223 This organization can help you set up your own charitable giving account (donor advised funds).
• www.generousYou.com

Resources for investing

• Sound Mind Investing with Austin Pryor: www.SoundMindinvesting.com
• Stewardship Partners: www.StewardshipPartners.com (for people with over $100K to invest)

Resources for financial & estate planning

• Because I Love You CHRISTIAN LEGACY ORGANIZER: www.MyFamilyForms.org
• Fulcrum Philanthropy Systems: www.Fulcrumps.com
• Kingdom Advisors: www.kingdomadvisors.org or 404-497-7680
• Ron Blue & Company: www.ronBlue.com or 800-841-0362
• The Christian Legal Society: www.CLSnet.org Referrals to Christ-centered attorneys.

Help with your giving and philanthropy

• Evangelical Council for Financial Accountability: www.ecfa.org or 800-3BE-WISE
• www.guideStar.org IRS990 financials for non-profits.
• www.Networkforgood.org Allows you to give electronically to churches, ministries and non-profit charities.
• www.Ministrywatch.com
• www.iDonate.com Allows you to donate cars, property, and assets to your church or favorite charities.
• Better Business Bureau for Charities: www.give.com

Help for Christian CEO's and business owners

• Fellowship of Companies for Christ International: www.FCCi-online.org
• www.360financialliteracy.org

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“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.

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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 keynote speaker at large churches, colleges, financial conferences, clergy gatherings, leadership conventions, and fundraising events. Brian lives with his family in Denver, CO.