

# Will Planning Guide

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4 Easy Steps  
to a  
Money-Saving Will



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# Will Planning Guide

## 4 Easy Steps to a Money-Saving Will

Congratulations! You are on your way to getting your financial house in order. Knowing you are honoring your family and the charities you care about while planning for your future is a great feeling.

We've created this guide to help you think through various aspects of leaving a legacy. It will help you consider important questions and save you time and money as you prepare to meet with an estate planning attorney. Simply fill in the blanks below as best you can in each of the four sections. If a question does not apply to you, just leave it blank.

Also, jot down any questions that come to mind as you fill in the blanks and take them with you to your meeting with the attorney. When you are finished, print a copy of this document for your records and a duplicate for the estate planning attorney.

## Step 1. Our Family

### You

Full Name:

---

Other names by which you have been known:

---

Citizenship:

---

Date of birth:

---

Social Security Number:

---

Status:       Single       Married       Widowed  
 Separated       Divorced       Re-Married

---

Existing will?       Yes       No

---

If yes, what is the date of that will?

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## Spouse/Partner (if applicable)

Full Name:

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Other names by which you have been known:

---

Citizenship:

---

Date of birth:

---

Social Security Number:

---

Status:       Single       Married       Widowed  
                  Separated       Divorced       Re-Married

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Existing will?       Yes       No

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If yes, what is the date of that will?

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## Children (including legally adopted, predeceased, or children by other marriages)

### Child #1

Full name:

---

Relationship:

---

Date of birth:

---

City/State:

---

Special needs?       Yes       No

---

If married, spouse's name:

---

Any children born of this child's marriage?       Yes       No

---

If yes, list names and ages:

---

---

## Child #2

Full name:

---

Relationship:

---

Date of birth:

---

City/State:

---

Special needs?       Yes    No

---

If married, spouse's name:

---

Any children born of this child's marriage?    Yes    No

---

If yes, list names and ages:

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## Child #3

Full name:

---

Relationship:

---

Date of birth:

---

City/State:

---

Special needs?       Yes    No

---

If married, spouse's name:

---

Any children born of this child's marriage?    Yes    No

---

If yes, list names and ages:

---

## Child #4

Full name:

---

Relationship:

---

Date of birth:

---

City/State:

---

Special needs?       Yes    No

---

If married, spouse's name:

---

Any children born of this child's marriage?    Yes    No

---

If yes, list names and ages:

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## More Children

If you have more than four children, you may list their information here.

## Step 2. The People We Trust

### Guardianship

Who would you want to be the guardian of any minor children if both you and your spouse/partner are deceased?

First choice:

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Contact information:

---

Second choice:

---

Contact information:

---

### Trustee

If you and your partner died leaving minor children, who would you want to manage their property until they are old enough to handle it on their own?

First choice:

---

Contact information:

---

Second choice:

---

Contact information:

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How and when would you like the assets in the Children's Trust distributed?

**Examples:**

- All paid out when my youngest is 25 years old
- 1/3 when my youngest is 21, 1/3 at 26, and 1/3 at 30
- 1/2 when my youngest is 25 and 1/2 at 30

Other instructions?

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## Executor or Personal Representative

Who would you want to supervise the execution of your will and final distribution of your property?

First choice:

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Contact information:

---

Second choice:

---

Contact information:

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Do you want to compensate your Executor or Personal Representative?  Yes  No

## Power of Attorney

Who do you want to handle your affairs if you're unavailable or unable to do so?

### Financial/Business Matters

First choice:

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Contact information:

---

Second choice:

---

Contact information:

---

### Health Care Decisions

First choice:

---

Contact information:

---

Second choice:

---

Contact information:

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## Special Instructions

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### Step 3. Our Money and Belongings

#### What We Own (Assets)

##### Checking

Institution name and address:

---

Name(s) on account:

---

\$ value:

---

If you have more than one checking account, list the institution name and address, name(s) on account, and \$ value here:

---

##### Savings

Institution name and address:

---

Name(s) on account:

---

\$ value:

---

If you have more than one savings account, list the institution name and address, name(s) on account, and \$ value here:

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## Certificates of Deposit

Institution name and address:

---

Name(s) on account:

---

\$ value:

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If you have more than one Certificate of Deposit, list the institution name and address, name(s) on account, and \$ value here:

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## Securities (stocks, bonds, mortgages, notes, or trust deeds)

Type of account:

---

Institution name and address:

---

Name(s) on account:

---

\$ value:

---

If you have more than one securities account, list the type of account, institution name and address, name(s) on account, and \$ value here:

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## Annuities

Institution name and address:

---

Name(s) on account:

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\$ value:

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If you have more than one annuity, list the institution name and address, name(s) on account, and \$ value here:

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## Retirement Accounts

Type of account:

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Institution name and address:

---

Name(s) on account:

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\$ value:

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Type of account:

---

Institution name and address:

---

Name(s) on account:

---

\$ value:

---

If you have additional retirement accounts, list the type of account, institution name and address, name(s) on account, and \$ value here:

---

## Additional Assets (business property, limited partnerships, notes receivable, etc.)

Description:

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Owner:

---

\$ value:

---

If you have additional assets, provide the description, owner, and \$ value here:

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## Life Insurance

Life insurance company:

---

Beneficiaries:

---

Face value:

---

If you have more than one life insurance policy, list the company, beneficiaries, and face value here:

---

## Homes and Real Estate

Home/real estate description:

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Address:

---

Name(s) on title:

---

Approximate \$ value:

---

If you have more than one home or property, list the home/real estate description, address, name(s) on title, and approximate \$ value here:

---

## Vehicles (automobile, RV, motorcycle, watercraft, etc.)

**First vehicle description:**

---

Owner:

---

\$ value:

---

**Second vehicle description:**

---

Owner:

---

\$ value:

If you have additional vehicles, list the description, owner name, and \$ value here:

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### Household Items (furnishings, antiques, jewelry, collectibles)

Description:

Owner:

\$ value:

List other significant household items here including description, owner, and \$ value:

## What We Owe (Liabilities)

### Loans, mortgages, credit cards, and other debts

Description:

\$ amount:

Description:

\$ amount:

Description:

\$ amount:

List any additional debts here. Provide the description and \$ amount:

## Step 4. The People and Charities We Want to Help

Not only does a will protect and provide for your family, but it also communicates what you care about to them and your passion for charities and the work they do. For many, a gift from their will (called a “bequest”) is the largest contribution they will ever make to charity. The most common approaches for charitable bequests are:

- **Add “Charity” to your family.** Some families treat charitable organizations like one additional child. For example, a family with three children might add a fourth child named “Charity” and divide the assets in their will into four equal parts. Each of their children would receive 25%, and the remaining 25% would be divided among their favorite charitable organizations.
- **Percentage of your estate.** Other families commit a percentage of their estate to the charitable organizations they love, dividing the remaining percentage among their heirs.
- **Set a cap.** Others decide on a “cap” for their children’s inheritance, leaving the rest of their assets to advance charity work. This approach is used when the parents want to provide a modest gift to bless their children and eliminate concerns of creating dependence or giving too much too soon.

Use the following pages to list the people and charitable organizations to whom you wish to make a bequest.

*This Will Planning Guide (or legacy planner) is a free resource provided by the Chautauqua Foundation. If you wish to leave a legacy through a gift in your will to us, our legal name and Tax ID number are:*

**Legal Name:** Chautauqua Foundation

**Federal Tax ID:** 16-6028421

1

Name of Person or Charitable Organization:

City/State:

Percentage or dollar amount of your estate  
you wish to leave to this person or organization:

Tax ID #:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

2

Name of Person or Charitable Organization:

City/State:

Percentage or dollar amount of your estate  
you wish to leave to this person or organization:

Tax ID #:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

3

Name of Person or Charitable Organization:

City/State:

Percentage or dollar amount of your estate  
you wish to leave to this person or organization:

Tax ID #:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

Name of Person or Charitable Organization:

4

City/State:

Percentage or dollar amount of your estate  
you wish to leave to this person or organization:

Tax ID #:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

Name of Person or Charitable Organization:

5

City/State:

Percentage or dollar amount of your estate  
you wish to leave to this person or organization:

Tax ID #:

Description of property you wish to leave (land, home, jewelry, collectibles, etc.)

**Congratulations on completing this important planning document. Print a copy for your records and a duplicate copy for your estate planning attorney.**

We hope that you'll experience the peace that comes from knowing your financial affairs are in order. Your future planning will help your family, advance the work of charities, and impact lives for generations.