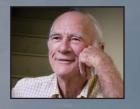
# Your Personal Estate Planning Record

















Illinois South Conference United Church of Christ 1312 Broadway Highland, IL 62249 Phone: 618-654-2125



# **Important Accounts & Passwords**

| Account/Website | Login    | Password |
|-----------------|----------|----------|
|                 |          |          |
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|                 |          |          |

# Family and Other Information for your attorney and your financial advisor

| Full Name —        |                |   |             |  |
|--------------------|----------------|---|-------------|--|
| Address            |                |   |             |  |
| City               | State          | Zip   | Telephone   |  |
|                    |                |   |             |  |
|                    |                |   |             |  |
|                    |                |   | Disability? |  |
| Explain ———        |                |   |             |  |
| Marital Status     |                | Name of Spouse  |             |  |
| Address —          |                |   |             |  |
| Date of Birth      |                | Social Security #   |             |  |
| Nearest Relatives: | List in order: | <ul><li>1 Children</li><li>2 Grandchildren</li><li>3 Brothers &amp; Signature</li><li>4 Parents</li></ul> |             |  |

| Full Name | Relationship | Age | Address |
|-----------|--------------|-----|---------|
|           |              |     |         |
|           |              |     |         |
|           |              |     |         |
|           |              |     |         |
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|           |              |     |         |
|           |              |     |         |
|           |              |     |         |
|           |              |     |         |

<sup>\*</sup>Insert additional pages as needed

### What Do You Have To Will?

### I. Personal Property

A. Household furnishings, furniture, books, musical instruments, auto, etc. List items for special consideration. Others may be grouped. If owned jointly, specify the joint owner.\*

| special consider       | Item If jointly held, with whom Approx |   |            | ***  |            |
|------------------------|--|---|------------|------|------------|
| Ite                    | :m                                     | If jointly held, with whom                  |            | App  | rox. Value |
|                        |  |   |            |      |            |
|                        |  |   |            |      |            |
|                        |  |   |            |      |            |
|                        |  |   |            |      |            |
|                        |  | Total Approximate                           | e Value    |      |            |
| B. Cash (Checl         | king Accounts)*                        |   |            |      |            |
|                        |  | TC: : 4 1 11 :4 1                           |            | . !! | <u> </u>   |
| Bank                   | Address                                | If jointly held, with whom                  | Accour     | nt#  | Amount     |
|                        |  |   |            |      | -          |
|                        |  | +   |            |      |            |
|                        |  | I I   |            |      |            |
|                        |  |   |            |      |            |
|                        |  |   |            |      |            |
|                        |  | Total in Check                              | zing Accou | ınte |            |
|                        |  | Total in Check                              | king Accou | ints |            |
| C. Cash (Savin         | gs Accounts)*                          |   | king Accou | ints |            |
| C. Cash (Savin<br>Bank | ngs Accounts)*  Address                | Total in Check  If jointly held, with whom  | king Accou |      | Amount     |
|                        | ,                                      |   |            |      | Amount     |
|                        | ,                                      |   |            |      | Amount     |
|                        | ,                                      |   |            |      | Amount     |
|                        | ,                                      |   |            |      | Amount     |
|                        | ,                                      |   |            |      | Amount     |
|                        | ,                                      |   | Accoun     | nt#  | Amount     |
| Bank                   | Address                                | If jointly held, with whom  Total in Saving | Accoun     | nt#  | Amount     |
|                        | ,                                      | If jointly held, with whom  Total in Saving | Accoun     | nt#  | Amount     |
| Bank                   | Address  onds (Government or           | If jointly held, with whom  Total in Saving | Account    | nt#  | Amount     |
| Bank  D. Stocks & Bo   | Address  onds (Government or           | If jointly held, with whom  Total in Saving | Account    | nt#  |            |
| Bank  D. Stocks & Bo   | Address  onds (Government or           | If jointly held, with whom  Total in Saving | Account    | nt#  |            |
| Bank  D. Stocks & Bo   | Address  onds (Government or           | If jointly held, with whom  Total in Saving | Account    | nt#  | Amount     |

Total Stocks & Bonds

<sup>\*</sup>Insert additional pages as needed

## **Inventory** (continued)

### E. Money Invested in Mortgages and Personal Loans (If jointly held, with whom?)\*

|  | em                                 | Address   |                          | Amount     |
|--|------------------------------------|---|--------------------------|------------|
|  |                                    |   |                          |            |
|  |                                    | Total Invested i  | n Property               |            |
| Total Appro  | oximate Value of all               | Personal Property (Add A, B,  | C, D, & E)               |            |
| . Real Proper  | rty (Real Estate &                 | & Buildings)  |                          |            |
| Type of Propert  | y Add                              | ress If jointly held,   | with whom                | Value      |
|  |                                    |   |                          |            |
|  |                                    |   |                          |            |
|  |                                    |   |                          |            |
|  |                                    | Total Approximate Value of Re   | al Property              |            |
| If the benefici  |                                    | rance policy should precede you i<br>e payable to your estate, and there                  |                          |            |
|  |                                    | e payable to your estate, and there   |                          | covered by |
| If the benefici beneficiary, the your will.                      | ne insurance would b               | e payable to your estate, and there   | efore, should be         | covered by |
| If the benefici beneficiary, the your will.                      | Types of Policy                    | Beneficiary   | Policy#                  | Amoun      |
| If the benefici beneficiary, the your will.                      | Types of Policy                    | e payable to your estate, and there   | Policy#                  | Amoun      |
| If the benefici beneficiary, the your will.  Company             | Types of Policy  Total Assets (Add | Beneficiary   | Policy#  y, & Insurance) | Amoun      |
| If the benefici beneficiary, the your will.  Company  Approximat | Types of Policy  Total Assets (Add | Beneficiary  Beneficiary  I Personal Property, Real Property                              | Policy#  y, & Insurance) | Amoun      |
| If the benefici beneficiary, the your will.  Company  Approximat | Types of Policy  Total Assets (Add | Beneficiary  Beneficiary  I Personal Property, Real Property  Ttgages Against Your Estate | Policy#  y, & Insurance) | Amoun      |
| If the benefici beneficiary, the your will.  Company  Approximat | Types of Policy  Total Assets (Add | Beneficiary  Beneficiary  I Personal Property, Real Property  Ttgages Against Your Estate | Policy#  y, & Insurance) | Amoun      |
| If the benefici beneficiary, the your will.  Company  Approximat | Types of Policy  Total Assets (Add | Beneficiary  Beneficiary  I Personal Property, Real Property  Ttgages Against Your Estate | Policy#  y, & Insurance) | Amoun      |
| If the benefici beneficiary, the your will.  Company  Approximat | Types of Policy  Total Assets (Add | Beneficiary  Beneficiary  I Personal Property, Real Property  Ttgages Against Your Estate | Policy#  V, & Insurance) | Amoun      |

\*Insert additional pages as needed

# For Further Information, Instructions or Questions

Costs vs. Values of Investments (Items on pages 2 & 3 that represent potential capital gain should be detailed below.)

| Asset<br>Description | Exact Title of<br>Ownership | Current<br>Value | Cost<br>Basis | Date & How<br>Acquired | Net Annual<br>Yield |
|----------------------|-----------------------------|------------------|---------------|------------------------|---------------------|
|                      |                             |                  |               |                        |                     |
|                      |                             |                  |               |                        |                     |
|                      |                             |                  |               |                        |                     |
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|                      |                             |                  |               |                        |                     |
|                      |                             |                  |               |                        |                     |
|                      |                             |                  |               |                        |                     |

| Your Signature – |  |  |
|------------------|--|--|
|                  |  |  |
| Date             |  |  |

### **How Do You Want Your Estate Distributed?**

You do not need to describe every item of your personal or real property in your will. Only if there is some specific item or piece of land that you want to go to a certain individual do you list it. And if you wish to name a specific sum of money to a person or organization, you will state the amount and the name.

| Person or Organization       | Address  | Item, Property or        |
|------------------------------|--|--------------------------|
| (Relationsiop                |  | Sum of Money             |
|                              |  |                          |
|                              |  |                          |
|                              |  |                          |
|                              |  |                          |
|                              |  |                          |
| tate is by percentages. Name | any, the simplest way to divide the person or organizations you total remaining amount of your | u wish to remember, then |

| Person or Organization<br>(Relationsiop | Address | Percentage |
|---|---------|------------|
|   |         |            |
|   |         |            |
|   |         |            |
|   |         |            |
|   |         |            |

### **Keep Control - Name Your Executor**

An executor is one who is appointed by you to carry out the terms of your will. If you do not name an executor in your will, or if your executor is unable to perform those duties (e.g. has died or is incapacitated), the court will appoint an administrator. He or she may not be the one who you would have appointed, so exercise the right to name the person of your choice.

| Name of Executor | Relationship | Alternate Executor | Relationship |
|------------------|--------------|--------------------|--------------|
| Address          |              | Address            |              |
| With Bond        | Without Bond | With Bond          | Without Bond |
| Corporate Exec   | utor         |                    |              |
|                  | Name         |                    |              |
|                  | Address      |                    |              |

### **Protect Your Children - Name Their Guardian**

If you have minor children, you should name a guardian for them in your will. This person will have charge of both the children and the property you have willed to them. You can narrow this service by having a guardian to care only for the children, and a separate guardian or trustee for their estate. He or she will hold the property and expend it as your will directs.

| Name of Executor | Relationship | Alternate Executor | Relationship |
|------------------|--------------|--------------------|--------------|
| Address          |              | Address            |              |
|                  |              |                    |              |
| Name of Executor | Relationship |                    |              |
| Address          |              |                    |              |

### **My Professional Advisors**

| Person                            | Address, City, State, Zip |
|-----------------------------------|---------------------------|
| My Minister                       |                           |
| My Attorney                       |                           |
| My Insurance<br>Agent             |                           |
| My Accountant                     |                           |
| My Banker or<br>Trust Officer     |                           |
| My Broker                         |                           |
| My Tax Records are located        |                           |
| My Safe Deposit<br>Box is located |                           |
| My Will is located                |                           |
| Copies of my will are located     |                           |

### For Further Information, Instructions or Questions

# One method of distributing the assets of your estate is by OUTRIGHT DISTRIBUTION.

**Distribution Clarification (Relates to Page 5)** 

1.

2.

By simple will, you leave what remains of your estate after debts and costs, outright to those you desire to receive such estate. In some instances, your wishes may be more fully carried out with avoidance of unnecessary taxation by incorporating a TESTAMENTARY TRUST in your will. For further clarification, please consult your attorney. Check one: ☐ A. Simple Will (Outright Distribution) ☐ B. Will with Testament Trust **Testament Trust to be Used** A. Primary purpose for Trust: ☐ To give spouse or other named person financial assistance and security without management responsibility. ☐ To assist children or grandchildren until they are capable of handling their own affairs. ☐ Other B. How do you want the principal ultimately distributed? To whom? At what age or time? What percentages?

C. Other specifics

<sup>\*\*</sup>Please consult your attorney regarding all estate planning matters.

# **Charitable Interests You May Wish to Consider**

You may wish to consider remembering a number of charitable interests as part of your estate planning process. Some of the charitable interests you may wish to consider may include:

| <b>Church Related Interests</b>          |      |
|--|------|
| My Local Church                          | 7111 |
| Illinois South Conference                |      |
| DuBois Center                            |      |
| United Church of Christ                  |      |
| CUE (Chicago, United, and Eden Seminarie | es)  |
| Deaconess Faith Community Nurse Ministri | ies  |
| Eden Theological Seminary                |      |
| Emmaus Homes, Inc.                       |      |
| Hitz Memorial Home                       |      |
| Hoyleton Ministries                      |      |
| Neighborhood Houses                      |      |
| New Athens Home for the Aged             |      |
| St. John's Community Care                |      |
| Uni-Pres Kindercottage                   |      |
| Uplands Village                          |      |
| Other Church Related Interests           |      |
|  |      |
|  |      |
|  |      |
|  |      |
|  |      |
|  |      |
| Other Charitable Interests               |      |
| Ovince Charles and Control Control       |      |
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|  |      |

# Sample Bequest Arrangements for the United Church of Christ

**Bequests to Your Local Church Unrestricted Gift** "I give, devise, and bequeath to my church,\_\_\_\_\_\_\_United Church of Christ of \_\_\_\_\_\_, Illinois, the sum of \_\_\_\_\_\_Dollars (\$\_\_\_\_\_) (or other specifically described personal or real property)." **Specific Percentage** "I give, devise, and bequeath to my church,\_\_\_\_\_\_\_United Church of Christ of \_\_\_\_\_\_, Illinois, an amount equal to \_\_\_\_\_\_percent (\_\_\_\_\_%) of the value of my net estate at the time of my death **Residual Bequest** "I give, devise, and bequeath all of the residue of my estate, both real and personal, to my church, \_\_\_\_\_United Church of Christ of \_\_\_\_\_\_, Illinois." **Contingent Bequest** "If the above named beneficiaries should predecease me, then I hereby give, devise, and bequeath all of my property and estate both real and personal, to my church,

United Church of Christ of \_\_\_\_\_\_, Illinois." **Bequests to Illinois South Conference of the United Church of Christ Unrestricted Gift** "I give, devise, and bequeath to Illinois South Conference of the United Church of Christ of Highland, Illinois, the sum of \_\_\_\_\_\_Dollars (\$\_\_\_\_\_) (or other specifically described personal or real property)." **Specific Percentage** "I give, devise, and bequeath to Illinois South Conference of the United Church of Christ of Highland, Illinois, an amount equal to \_\_\_\_\_percent (\_\_\_\_\_%) of the value of my net estate at the time of my death." **Residual Bequest** "I give, devise, and bequeath all of the residue of my estate, both real and personal, to Illinois South Conference of the United Church of Christ of Highland, Illinois." **Contingent Bequest** "If the above named beneficiaries should predecease me, then I hereby give, devise, and bequeath all of my property and estate both real and personal, to Illinois South Conference of the United Church of Christ of Highland, Illinois." **Bequests to the United Church of Christ Unrestricted Gift** "I give, devise, and bequeath the sum of \_\_\_\_\_\_ Dollars (\$\_\_\_\_\_) (or other specifically described personal or real property) to the United Church of Christ, 700 Prospect Avenue, Cleveland, OH 44115, to be used for the general uses and purposes of the United Church of Christ." **Specific Percentage** "I give, devise, and bequeath an amount equal to \_\_\_\_\_\_percent (\_\_\_\_\_%) of the value of my neet estate at the time of my death to the United Church of Christ, 700 Prospect Avenue, Cleveland, OH 44115, to be used for the general uses

### **Residual Bequest**

and purposes of the United Church of Christ."

"I give, devise, and bequeath all of the residue of my estate, both real and personal, to the United Church of Christ, 700 Prospect Avenue, Cleveland, OH 44115, to be used for the general uses and purposes of the United Church of Christ."

### **Contingent Bequest**

"If the above named beneficiaries should predecease me, then I hereby give, devise, and bequeath all of my property and estate both real and personal, to the United Church of Christ, 700 Prospect Avenue, Cleveland, OH 44115, to be used for the general uses and purposes of the United Church of Christ."

THERE ARE OTHER WAYS AND MEANS FOR FAVORING YOUR CHURCH, CONFERENCE, AND DENOMINATION. PLEASE CONSULT YOUR ATTORNEY.

### For more information, contact:



### **Illinois South Conference**

1312 Broadway Highland, IL 62249

Phone: 618-654-2125 Fax: 618-654-4054 http: www.iscucc.org

### OR



### **United Church of Christ**

Office of Philanthrophy & Stewardship 700 Prospect Avenue E Cleveland, OH 44115-1110 Phone: 800-846-6822

> Fax: 216-736-2297 http://www.ucc.org/giving E-mail: giving@ucc.org

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