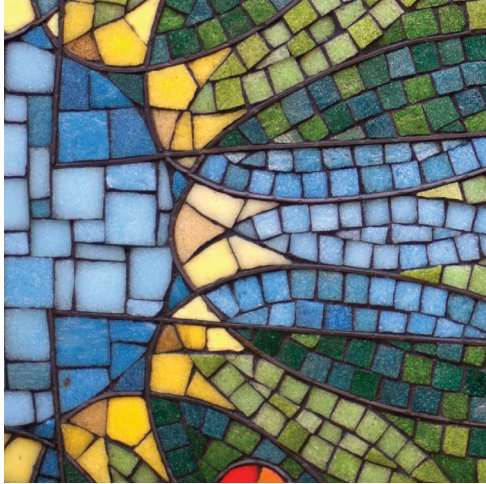


A helpful guide for my family and friends



ELCA Foundation
Evangelical Lutheran Church in America
 God's work. Our hands.



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In 1 Peter, Christians are encouraged to “always be prepared to give an account of the hope that is within you.” Preparing for our final testament can be an occasion to communicate to family and friends an accounting of the gifts God has given us and directions for how we want those gifts to be used in the future. Such preparation also allows us the opportunity to share our legacy – to tell our faith-inspired story, long into the future.

This guide, “Important Notes About My Estate: A helpful guide for my family and friends” is a gift to you from the ELCA Foundation. It is designed to help you capture the details around this very necessary information. From your estate plan assets and your funeral plans to the location of important documents, this guide will assist you in helping your family and friends at an important time. The “Will and Trust Workbook: A helpful guide for planning your estate” is also available through the ELCA Foundation.

Thank you for taking the opportunity and the time to organize and document these important life details. We encourage you to notify trusted individuals and the executor of your estate of this notebook and its location.

Please visit www.ELCA.org/importantnotes to access this helpful guide online.

1. ESTATE PLAN - (ADD ANOTHER SHEET IF NECESSARY)

MY WILL/LIVING TRUST

LOCATION _____

ATTORNEY _____ DATE OF LAST UPDATE _____

I HAVE A LIST OF PERSONAL ITEMS TO DISTRIBUTE. ☐ NO ☐ YES LOCATION _____

NAME OF EXECUTOR/TRUSTEE NAMED IN MY WILL

NAME _____ PHONE _____ EMAIL _____

NAME _____ PHONE _____ EMAIL _____

2. IMPORTANT DOCUMENTS - (ADD ANOTHER SHEET IF NECESSARY)

LOCATION OF

BIRTH CERTIFICATE _____ MARRIAGE CERTIFICATE _____

CHILDREN'S BIRTH CERTIFICATES _____

ADVANCE DIRECTIVE _____ DURABLE POWER OF ATTORNEY FOR HEALTHCARE _____ DURABLE POWER OF ATTORNEY FOR FINANCES _____

DIVORCE DECREE _____

INCOME TAX RECORDS

ACCOUNTANT _____ ADDRESS _____ PHONE/WEBSITE/EMAIL _____

CITY _____ STATE _____ ZIP CODE _____

SOCIAL SECURITY NUMBER _____ SPECIAL S.S.I. BENEFITS _____

VETERAN BENEFITS ☐ NO ☐ YES

VA CLAIM NUMBER _____ LOCATION OF DISCHARGE DOCUMENT _____

IRA/KEOGH/401(K)/403(B)/PENSION PLAN

TYPE _____ CUSTODIAN _____

ADDRESS _____ PHONE/WEBSITE/EMAIL _____

CITY _____ STATE _____ ZIP CODE _____

TYPE _____ CUSTODIAN _____

ADDRESS _____ PHONE/WEBSITE/EMAIL _____

CITY _____ STATE _____ ZIP CODE _____

3. ASSETS - (ADD ANOTHER SHEET IF NECESSARY)

LIFE INSURANCE POLICIES

NAME	POLICY NUMBER	
COMPANY	AGENT	
ADDRESS	PHONE/WEBSITE/EMAIL	
CITY	STATE	ZIP CODE
OWNER	AMOUNT	
LOCATION OF POLICY INFORMATION		

COMMERCIAL ANNUITIES

COMPANY NAME	CONTRACT NAME	
ADDRESS	PHONE/WEBSITE/EMAIL	
CITY	STATE	ZIP CODE

REAL ESTATE

REAL ESTATE OWNED		
LOCATION OF DEED, MORTGAGE AND DOCUMENTS		
INSURANCE COMPANY NAME		
ADDRESS	PHONE/WEBSITE/EMAIL	
CITY	STATE	ZIP CODE
LOCATION OF POLICY		

AUTOMOBILE INSURANCE POLICY

COMPANY NAME	POLICY NUMBER	
ADDRESS	PHONE/WEBSITE/EMAIL	
CITY	STATE	ZIP CODE

BANK ACCOUNTS

BANK NAME		
ADDRESS	PHONE/WEBSITE/EMAIL	
CITY	STATE	ZIP CODE
ACCOUNT TYPE	NUMBER	

3. ASSETS - (CONTINUED)

CERTIFICATES OF DEPOSIT

BANK NAME

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

ACCOUNT TYPE

NUMBER

MISSION INVESTMENT FUND OF THE ELCA

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

ACCOUNT TYPE

NUMBER

SAFE DEPOSIT BOX

NUMBER

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

SECURITIES/MUTUAL FUNDS

BROKER NAME

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

LOCATION OF STOCK CERTIFICATES

BROKER NAME

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

LOCATION OF STOCK CERTIFICATES

GOVERNMENT BONDS

3. ASSETS - (CONTINUED)

OTHER ASSETS: BUSINESS AND PERSONAL

4. BEQUEST OR OTHER CHARITABLE PROVISIONS

I have included in my will: ☐ My church ☐ My ELCA synod ☐ ELCA churchwide ministries

ELCA Charitable Gift Annuity	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Other Charitable Gift Annuity	<input type="checkbox"/> Yes	<input type="checkbox"/> No

CHARITY NAME

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

ELCA Charitable Remainder Trust	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Other Charitable Remainder Trust	<input type="checkbox"/> Yes	<input type="checkbox"/> No

TRUSTEE NAME

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

ELCA Donor Advised Fund	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Other Donor Advised Fund	<input type="checkbox"/> Yes	<input type="checkbox"/> No

CUSTODIAN NAME

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

ELCA Memorial Endowment Fund	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Other Memorial Endowment Fund	<input type="checkbox"/> Yes	<input type="checkbox"/> No

CUSTODIAN NAME

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

Other Charitable Gift Arrangements

5. MEMORIAL SERVICE/FUNERAL PLAN - (ADD ANOTHER SHEET AS NECESSARY)

BASIC INSTRUCTIONS

BURIAL

CREMATION

PREFERRED FUNERAL HOME

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

SERVICE LOCATION

CHURCH

FUNERAL HOME

OTHER _____

FLOWERS

HYMNS/SONGS

PALLBEARERS

PRAYER

SCRIPTURE

OTHER

CHURCH INFORMATION

CONGREGATIONAL MEMBERSHIP

ADDRESS

PHONE/WEBSITE/EMAIL

CITY

STATE

ZIP CODE

PASTOR(S)

OTHER PEOPLE TO CONTACT

NAME

RELATIONSHIP

PHONE/EMAIL

NAME

RELATIONSHIP

PHONE/EMAIL

NAME

RELATIONSHIP

PHONE/EMAIL

MEMORIAL CONTRIBUTIONS

I WOULD LIKE GIFTS TO BE DIRECTED IN MY MEMORY TO THE FOLLOWING (SPECIFIC MINISTRIES, LOCAL CONGREGATION, OTHER CHARITY)



ELCA Foundation
Evangelical Lutheran Church in America
God's work. Our hands.

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This guide, **“Important Notes About My Estate: A helpful guide for my family and friends,”** is provided courtesy of the ELCA Foundation. It is intended to be a useful tool for you in your estate planning.

The ELCA Foundation exists to sustain and grow ministries of the Evangelical Lutheran Church in America. Through our nationwide network of professional gift planning staff, we assist members in their call to live as faithful and generous stewards. We also support and strengthen the ministry of congregations, agencies and institutions through education, resources, support and investment management services.

Please visit www.ELCA.org/foundation to discover other ways to share your faith-inspired story.