

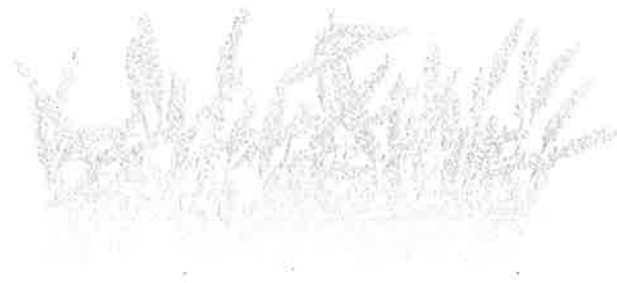
THE EPISCOPAL CHURCH FOUNDATION

The Episcopal Diocese of Maryland



Planning for the End of Life

Revised August 30, 2012



“THE MINISTER OF THE CONGREGATION IS DIRECTED TO INSTRUCT THE PEOPLE, FROM TIME TO TIME, ABOUT THE DUTY OF CHRISTIAN PARENTS TO MAKE PRUDENT PROVISION FOR THE WELL-BEING OF THEIR FAMILIES, AND OF ALL PERSONS TO MAKE WILLS, WHILE THEY ARE IN HEALTH, ARRANGING FOR THE DISPOSAL OF THEIR TEMPORAL GOODS, NOT NEGLECTING, IF THEY ARE ABLE, TO LEAVE BEQUESTS FOR RELIGIOUS AND CHARITABLE USES.”

—THE BOOK OF COMMON PRAYER
PAGE 445



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PREPARING TO WRITE YOUR WILL

AN ESTATE PLAN THAT REFLECTS YOUR VALUES

Writing a will is a loving and responsible act for the sake of your family. Here are a few helpful suggestions on how to prepare to write your will:

BEQUESTS IN YOUR WILL CAN TAKE SEVERAL FORMS

- An outright monetary bequest.
- A percentage of an estate.
- A specific asset, such as personal or real
- A trust created in a will.

BEFORE SEEING AN ATTORNEY...

- List everyone that you would like to remember in your will.
- Make a list of everyone for whom you are responsible.
- List all of your material assets.
- After subtracting your debts, match the names with the assets or consider giving a portion of your total estate to each individual. Take care of your family first. This is also the time to consider special friends and your church.
- Consider establishing a trust if your estate is large enough. (See our Charitable Remainder Trusts kit.)
- Ask your chosen estate administrator (sometimes called executor/executrix) if he or she is willing to serve.
- Consult with the people you select as guardians of your children (where minor children are involved).
- Talk with your priest to explore the ministries of the church that could best be funded with a gift from your will.
- A contingent beneficiary, i.e., the church receives the assets if there are no surviving beneficiaries.

Note: A bequest to the church is deductible from the value of your estate for tax purposes.

AFTER MAKING YOUR WILL ...

- Make sure someone knows where your will is located.
- Do not place funeral instructions in a safe-deposit box. Generally, services will be over by the time your administrator checks your bank box. Instead, leave a copy of your funeral plans and wishes with your priest and a member of your family.
- Review your will from time to time with your legal advisor. Laws, assets, and personal interests often change over time.

Preparing to write a will is an act of love for your family and friends, a way of easing the pain of loss that follows death. It is also your final legacy.

INCLUDING A CHRISTIAN PREAMBLE

A Christian preamble to your will provides a significant opportunity to share your faith with family and friends. Through this personal statement of your faith, an important message will be delivered to those who love and know you best. This message of faith comes at a time of grief and loss and serves as a reminder to them to place their trust in Jesus Christ as you have. Remember, this may be the last document they read about you, their loved one.

As you, together with your attorney, prepare your Will/Estate plan, give prayerful consideration to adding a Christian preamble such as:

I _____, of the City of _____, County of _____, and State of _____, being of sound mind and memory and being under no restraint, do make, declare and publish this my last will and testament, hereby revoking all wills and codicils heretofore made by me.

In thanksgiving to God for the gifts of life given in baptism, and for the many blessings God has showered upon me; and in thanksgiving to God for the gifts of faith and hope through Jesus Christ; and in thanksgiving to God for the gifts of nurture and love through the Church where we have shared faith and fellowship; I now commend my loved ones to grow in this same faith, being true to their own baptisms, knowing that God will continue to provide for them in their lifetimes; I encourage them to place their faith and trust in our Lord and Savior.

I know, therefore ...

[The particulars of the will would follow, leaving gifts to family and friends, but also an articulation of the gifts you might leave to the various ministries of the Church].

You may also want to use the following language for your gifts to support various ministries of the Church.

I faithfully respond with a decision to establish the [insert the name of the fund, such as your own] Memorial Endowment Fund. The fund is an expression of my thanksgiving and stewardship with the hope that the ministries of Jesus Christ will be strengthened and extended in the life of the Church.

The fund assets are to be invested and reinvested in perpetuity by the Endowment Fund of the Episcopal Church Foundation (ECF) according to the prevailing policies for endowment management. The periodic distribution of the fund is to be used to support ministry(ies) in the

following manner. [Here you would stipulate which ministry(ies) would receive an annual gift from your Memorial Endowment Fund.]

Your attorney may also need the following official language for gifts to the ECF. All gifts to whatever ECF ministry can be left to *"the Episcopal Church Foundation, a New York, non-profit organization, located at 815 Second Avenue, New York, NY 10017."* All bequests should be made to and sent to the attention of the Episcopal Church Foundation.

Adapted with special thanks to the Evangelical Lutheran Church in America.

SAMPLE FORMS OF BEQUEST

Specific Amount:

I, _____, hereby give, devise, and bequeath to the Rector, Wardens, and Vestry of Your Episcopal Church, 123 Main Street, Anywhere, MyState, 00000, the sum of \$XX,XXX to be used at their discretion to assist in the ministries of the Church.

* * * * *

Percentage Amount:

I, _____, hereby give, devise, and bequeath to the Rector, Wardens, and Vestry of Your Episcopal Church, 123 Main Street, Anywhere, MyState, 00000, XX% of the rest, residue, and remainder of my estate, to be used at their discretion to assist in the ministries of the Church.

* * * * *

Contingency Bequest:

In the event the beneficiaries of bequests and devises herein predecease me, or, in the case of institutions, cease to be organizations described in section 501(c)(3) of the Internal Revenue Code, I, _____, hereby give, devise, and bequeath to the Rector, Wardens, and Vestry of Your Episcopal Church, 123 Main Street, Anywhere, MyState, the rest, residue and remainder of my estate, to be used at their discretion to assist in the ministries of the Church.

* * * * *

INFORMATION NEEDED FOR MAKING A WILL

1. Full Legal Name

(Name)

(Date of Birth)

(Social Security Number)

(Street Address, PO Box, and/or Apartment #)

(County)

(City)

(State)

(Zip Code)

(Email Address)

(Armed Forces Date of Service)

(Discharge Certificate Location)

(Serial Number)

Marital Status: ☐ Single ☐ Married ☐ Divorced ☐ Remarried ☐ Separated ☐ Widowed

2. Do you have a Will?

☐ Yes ☐ No (If no, go to Family Information)

3. Since making your last Will, have you:

Moved to another state?

☐ Yes

☐ No

Sold or bought property?

☐ Yes

☐ No

Celebrated the birth of a child or grandchild?

☐ Yes

☐ No

Changed your marital status?

☐ Yes

☐ No

Changed your mind about your personal representative (executor)?

☐ Yes

☐ No

Changed your mind about the guardian for your child?

☐ Yes

☐ No

Done family financial and charitable gift planning?

☐ Yes

☐ No

If the answer is yes to any of the above, your Will may need to be updated. Complete the following questions, then consult with your attorney.

FAMILY INFORMATION

1. Legal Name of Spouse

(Name) (Date of Birth) (Social Security Number)

(Street Address, PO Box, and/or Apartment #) (County)

(City) (State) (Zip Code) (Email Address)

Does your spouse have a Will? ☐ Yes ☐ No

2. Children

List your children, including those legally adopted.

(Full Name) (Street Address, PO Box, and/or Apartment #) (City/State/Zip Code) (Date of Birth)

3. Other Dependents

4. Other Loved Ones

5. Person(s) to be the Guardian(s) of My Child(ren)

(Name) (Telephone)

(Street Address, PO Box, and/or Apartment #)

(City) (State) (Zip Code)

(Name) (Telephone)

(Street Address, PO Box, and/or Apartment #)

(City) (State) (Zip Code)

6. Executor Person(s) to be the personal representative
of my estate.

(Name) (Telephone)

(Street Address, PO Box, and/or Apartment #)

(City) (State) (Zip Code)

(Name) (Telephone)

(Street Address, PO Box, and/or Apartment #)

(City) (State) (Zip Code)

7. Location of My Records

(Will)

(Living Will)

(Birth Certificate)

(Social Security Card)

(Tax Records)

(Safe-Deposit Box and Key)

(Insurance Policies)

(Durable Power of Attorney)

(Durable Power of Attorney for Healthcare)

(Funeral Directions)

8. Beneficiary Information

(Persons, Parish/Mission, or charitable associations you wish to thank for being part of your life.)

(Name)

(Name)

(Name)

(Residual Beneficiary—The final or residual beneficiary receives what is left over after all other bequests have been paid according to your Will. Please consider naming your Parish/Mission or the Episcopal Church Foundation as a residual beneficiary.)

FINANCIAL INFORMATION

1. Present Annual Income

Salary \$ _____

Investment Income \$ _____

Other \$ _____

TOTAL \$ _____

2. Property

Real Estate

	(Description and Location)	(Original Cost)	(Present Market Value)	(Amount of Mortgage)
1.				
2.				
3.				
4.				

3. Notes and Mortgages

	(Name of Debtor)	(Description)	(Amount)	(Interest Rate)	(Rate of Payment)
1.					
2.					
3.					
4.					

4. Leases

1.	
2.	
3.	

5. Bank Accounts/Savings Institution Accounts/Other Income-Producing Accounts

	(Name of Institution)	(Type)	(Account Number)
1.			
2.			
3.			
4.			

6. Stocks - Attach a copy of your brokerage statement or list:

	(Corporation)	(# of Shares)	(Original Cost)	(Market Value)
1.				
2.				
3.				
4.				
5.				

7. Insurance Policies

	(Company)	(Policy #)	(Face Value)	(Cash Value)
1.				
2.				
3.				

8. Other Assets

	(Description)	(Location)	(Cost)	(Present Value)
1.				
2.				
3.				
4.				
5.				

Notes

The All Saints' Legacy Society

Enrollment Form

The All Saints' Legacy Society honors individuals who make an investment in future ministry by including a congregation, the Diocese of Maryland, or other Episcopal institution in their estate plans or through life income gifts to a donor designated fund.

☐ I (We) accept the invitation to join the ***All Saints' Legacy Society*** of the Episcopal Diocese of Maryland.

Name(s): _____

Address: _____

Phone & Email: _____

Congregation: _____

On the roll of the All Saints' Legacy Society, I (we) wish my (our) name(s) to appear as: _____

Signed: _____ Date: _____

☐ I consent for my (our) name(s) to appear with others on the public roster of the Society.

☐ I (We) wish to remain anonymous.

Please return this form to the Development Office of the Episcopal Diocese of Maryland

Thank you very much!
Your gift will be a blessing to many.



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