

Important Notes About My Estate

A helpful guide for my family and friends



ELCA Foundation

Evangelical Lutheran
Church in America

God's work. Our hands.



ELCA Foundation
Evangelical Lutheran Church in America

Dear friend in Christ,

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 the very necessary information. From your estate plan assets and your funeral plans to the location of important documents, this guide will help you help 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. I encourage you to notify trusted individuals and the executor of your estate of this notebook and its location.

Blessings,

Cynthia J. Halverson
President, ELCA Foundation

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

1. Estate Plan - (add another sheet as necessary)

My Will/Living Trust

Location _____

Attorney _____

Date of Last Update _____

I have a separate list of personal items to distribute. No Yes

Location _____

Name of Executor/Trustee Named in My Will

Name _____

Phone/e-mail _____

Name _____

Phone/e-mail _____

2. Important Documents - (add another sheet as 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/Web site/e-mail _____

City _____

State _____

Zip _____

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/Web site/e-mail _____

City _____

State _____

Zip _____

Type _____

Custodian _____

Address _____

Phone/Web site/e-mail _____

City _____

State _____

Zip _____

3. Assets - (add another sheet as necessary)

Life Insurance Policies

Name	Policy number	
Company	Agent	
Address	Phone/Web site/e-mail	
City	State	Zip
Owner	Amount	
Location of Policy Information		

Commercial Annuities

Company Name	Contract Name	
Address	Phone/Web site/e-mail	
City	State	Zip

Real Estate

Real Estate Owned		
Location of Deed, Mortgage and Documents		
Insurance Company Name		
Address	Phone/Web site/e-mail	
City	State	Zip
Location of Policy		

Automobile Insurance Policy

Company Name	Policy Number	
Address	Phone/Web site/e-mail	
City	State	Zip

Bank Accounts

Bank Name		
Address	Phone/Web site/e-mail	
City	State	Zip
Account Type	Number	

3. Assets continued- (add another sheet as necessary)

Certificates of Deposit

Bank Name

Address

Phone/Web site/e-mail

City

State

Zip

Account Type

Number

Mission Investment Fund of the ELCA

Address

Phone/Web site/e-mail

City

State

Zip

Account Type

Number

Safe Deposit Box

Number

Bank Name

Address

Phone/Web site/e-mail

City

State

Zip

Securities/Mutual Funds

Broker Name

Address

Phone/Web site/e-mail

City

State

Zip

Location of Stock Certificates

Broker Name

Address

Phone/Web site/e-mail

City

State

Zip

Location of Stock Certificates

Government Bonds

3. Assets continued - (add another sheet as necessary)

Business/Other Assets

4. Bequest or Other Charitable Provisions - (add another sheet as necessary)

ELCA Charitable Gift Annuity
Other Charitable Gift Annuity

Yes
 Yes

No
 No

Charity Name

Address

Phone/Web site/e-mail

City

State

Zip

ELCA Charitable Remainder Trust
Other Charitable Remainder Trust

Yes
 Yes

No
 No

Trustee Name

Address

Phone/Web site/e-mail

City

State

Zip

ELCA Donor Advised Fund
Other Donor Advised Fund

Yes
 Yes

No
 No

Custodian Name

Address

Phone/Web site/e-mail

City

State

Zip

ELCA Memorial Endowment Fund
Other Memorial Endowment Fund

Yes
 Yes

No
 No

Custodian Name

Address

Phone/Web site/e-mail

City

State

Zip

Other Charitable Gift Arrangements

Yes

No

5. Memorial Service/Funeral Plan - (add another sheet as necessary)

Basic Instructions

Burial Cremation Other _____

Preferred Funeral Home

Address _____ Phone/Web site/e-mail _____

City _____ State _____ Zip _____

Service Location

Church Funeral Home Other _____

Flowers

Hymns/Songs

Pallbearers

Prayer

Scripture

Other

Church Information

Congregation Name

Address _____ Phone/Web site/e-mail _____

City _____ State _____ Zip _____

Pastor(s)

Other People To Contact

Name	Relationship	Phone/e-mail
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Name	Relationship	Phone/e-mail
------	--------------	--------------

Name	Relationship	Phone/e-mail
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Memorial Contributions

I would like gifts to be directed in my memory to the following (specific ministries, local congregation, other charity)

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.

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