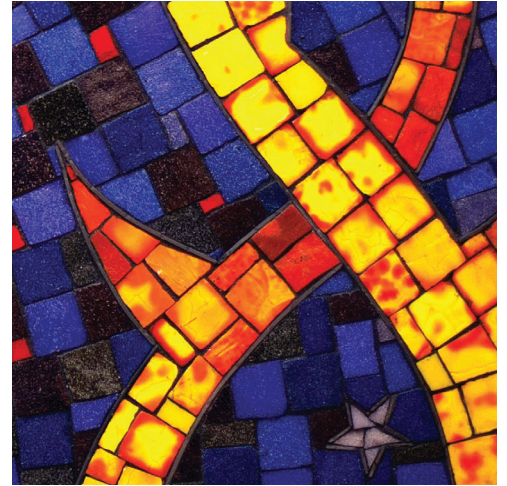
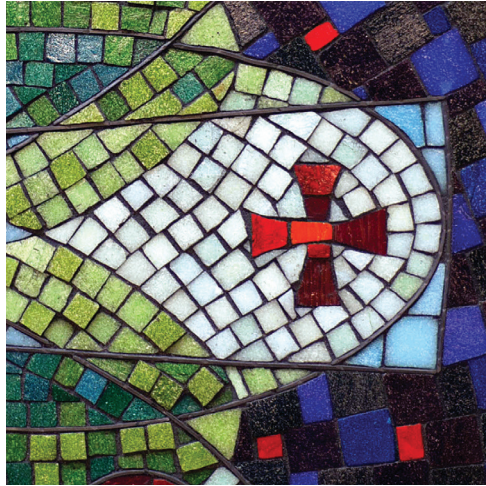


# IMPORTANT NOTES ABOUT MY ESTATE



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**

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. It’s possible that not all of the information requested in this booklet will pertain to you. That’s okay. Providing all you can is one of the final gifts you can give your loved ones. 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](http://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 \_\_\_\_\_

ADDRESS \_\_\_\_\_

PHONE/EMAIL \_\_\_\_\_

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 \_\_\_\_\_

## 2. IMPORTANT DOCUMENTS - (CONTINUED)

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

FINANCIAL ADVISOR

ADDRESS

PHONE/EMAIL

CITY

STATE

ZIP CODE

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

### 3. ASSETS - (CONTINUED)

#### 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

#### 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

### 3. ASSETS - (CONTINUED)

#### SAFE DEPOSIT BOX

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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

#### 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

I HAVE A DISTRIBUTION AGREEMENT AND/OR GIFT PLAN DOCUMENTED WITH THE ELCA FOUNDATION       YES       NO

ELCA CHARITABLE GIFT ANNUITY       YES       NO

OTHER CHARITABLE GIFT ANNUITY       YES       NO

---

CHARITY NAME

---

ADDRESS

PHONE/WEBSITE/EMAIL

---

CITY

STATE

ZIP CODE

ELCA CHARITABLE REMAINDER TRUST       YES       NO

OTHER CHARITABLE REMAINDER TRUST       YES       NO

---

TRUSTEE NAME

---

ADDRESS

PHONE/WEBSITE/EMAIL

---

CITY

STATE

ZIP CODE

ELCA DONOR ADVISED FUND       YES       NO

OTHER DONOR ADVISED FUND       YES       NO

---

CUSTODIAN NAME

---

ADDRESS

PHONE/WEBSITE/EMAIL

---

CITY

STATE

ZIP CODE

ELCA NAMED ENDOWMENT FUND       YES       NO

OTHER NAMED ENDOWMENT FUND       YES       NO

---

CUSTODIAN NAME

---

ADDRESS

PHONE/WEBSITE/EMAIL

---

CITY

STATE

ZIP CODE

OTHER CHARITABLE GIFT ARRANGEMENTS

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## 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)

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**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](http://www.ELCA.org/foundation) to discover other ways to share your faith-inspired story.