PERSONAL ESTATE PLANNING ORGANIZER

Presented to

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with the compliments and best wishes of

THE SALVATION ARMY®

DOING THE MOST GOOD®

THE FIRST STEP

For many people, the most difficult part of making a will is the first step — collecting the necessary information. We offer this Estate Planning Organizer as a way to make the process easier. When completed, it will serve many good purposes. It may save time when you visit your attorney to make your will (and could possibly reduce your attorney's fees). It will be a valuable aid to your personal representative and can make a difficult time easier for your loved ones. Think of collecting this information and preparing your will as an act of love for the people and causes you care about. It truly is.

Instructions: Please complete this form as best as possible. It is not necessary to include exact values of any assets, since these typically change as time passes. However, noting approximate values will help you and your advisors make decisions on their eventual distribution.

Date Completed ______________________________

Financial Information - Assets

Bank Accounts, CDs	Estimated Value	Owned by: You	Spouse	Joint
	$	☐	☐	☐
	$	☐	☐	☐
	$	☐	☐	☐
Total:	$			

Mutual Funds				
	$	☐	☐	☐
	$	☐	☐	☐
	$	☐	☐	☐
Total:	$			

Stocks				
	$	☐	☐	☐
	$	☐	☐	☐
	$	☐	☐	☐
Total:	$			

Bonds				
	$	☐	☐	☐
	$	☐	☐	☐
Total:	$			

Commercial Annuities				
	$	☐	☐	☐
	$	☐	☐	☐
Total:	$			

Charitable Annuities		Annuitants (one or two)	If two, second Beneficiary
	$		
	$		

IRAs

Traditional	Value	Beneficiary (ies)
	$	
	$	

Roth		
	$	
	$	

Retirement Plans *(401k, 403b, pensions, profit sharing, etc.)*	Value	Beneficiary (ies)
	$	
	$	

Life Insurance Policies		
	$	
	$	

Please note: You should keep this organizer in a safe place, since it contains confidential, personal information.

Real Estate

	Value	Mortgage Balance	Owner(s): You	Spouse	Joint
Principal Residence Address	$	$	☐	☐	☐
Other *(second home, rental property, commercial property)* Address	$	$	☐	☐	☐
Address	$	$	☐	☐	☐

Closely Held Business Interests *(major stockholder, partner, owner)*

	Estimated Value of Interest	You	Spouse	Other
Business	$	☐	☐	☐
Business	$	☐	☐	☐

Personal Property *(you may wish to add inventories)*

Furnishings *(description and location)*

	Value	You	Spouse	Joint
	$	☐	☐	☐
	$	☐	☐	☐

Vehicles

	Value	You	Spouse	Joint
Auto/Truck (Make/Yr.)	$	☐	☐	☐
Auto/Truck (Make/Yr.)	$	☐	☐	☐
Boat/RV/Etc. (Make/Yr.)	$	☐	☐	☐

Works of Art

	Value	You	Spouse	Joint
Description	$	☐	☐	☐
Location				
Description	$	☐	☐	☐
Location				

Collections *(stamps, coins, etc.)*

Description	$	☐	☐	☐
Location				
Description	$	☐	☐	☐
Location				

Jewelry *(description and location)*

	Total Value
	$

Other *(intellectual property, rights, etc.)*

	$
	$
	$

My Intentions For My Estate

People to Remember

Family

Name	Relationship	Address

Friends/Associates

Charitable Beneficiaries

Name	Location	Contact

Guardian(s) for Minor or Dependent Adult Children

Alternate Guardian(s) for Minor or Dependent Adult Children

Person Authorized to Handle My Affairs (Executor)

Name	Address	Phone Number

Alternate Person Authorized to Handle My Affairs (Executor)

My Advisors

	Name	Phone Number
Attorney		
Accountant/Tax Adv.		
Financial Planner		
Insurance Agent		
Salvation Army Gift Planner		

My Current Plans For My Final Years

(Check if complete.)

- ☐ I have a health care directive.
- ☐ I have designated a power of attorney to give a trusted individual the right to make financial decisions and transactions for me if I am incapacitated.
- ☐ I have formally designated a legal guardian and alternate for minor children in my custody.
- ☐ I have formally designated a personal representative (executor) and alternate to carry out my wishes.

If you don't yet have these, discuss with your attorney when you meet to draft your will.

The following are things your next of kin and executor will need to know.

- ☐ Location of your important financial papers, including your will.
- ☐ Location of user names and passwords for accounts you manage online.
- ☐ Any arrangements you have made for your funeral, burial, etc., especially if these are prepaid.
- ☐ Your personal preferences for your final services and tributes.
- ☐ Names and contact information of your attorney, financial advisers, banker and the planned giving executive of charities mentioned in your will.
- ☐ People who need to be notified and how to contact them.
- ☐ Location of your military discharge papers, if you served in the military.

Personal Information

Name: Birth Date:

Citizenship: Occupation:

Home Address:

Street City State Zip

Home Phone: Day Phone:

Marital Status: ☐ Married ☐ Single ☐ Widowed ☐ Divorced

Family Information

Spouse

Name: Birth Date:

Citizenship: Occupation:

Home Address:

Street City State Zip

Home Phone: Day Phone:

Children's Names Date of Birth

Why Your Will Is So Important

1. It lets you direct the distribution of the assets as you wish. Without a will, the court will make the decisions, based on state law.
2. A will makes the transition easier on loved ones and can give the benefits of your assets more quickly.
3. Without a will, the court will determine who is to be the guardian of children in your custody. It may not be the people you would have picked.
4. If you die without a will or other formal transfer arrangement, none of your assets will go to your church, your schools or charitable organizations you had planned to support. Your will is an important statement of the spiritual and charitable values for which you want to be remembered.

If You Already Have a Will…

It's a good idea to take a look at your will at least once every five years and to update it when major life changes like the following occur:

- Your spouse or another heir dies.
- You marry or remarry.
- You become divorced.
- Children or grandchildren are born.
- You retire.
- You move, especially if you move to another state.

I'll Be Happy to Help!

If you need some assistance preparing for your visit to an attorney, please call. The service is free, and there is no obligation. Just call 207-245-3734, and ask for me, Amy Anderson CAP®. Another option is a visit to www.tsalegacy.org. You will find excellent information and good ideas there. Thank you for your support of The Salvation Army.

Online Accounts

Web Address:	Username:	Password:

A few examples of items to include in this section: email addresses, social media accounts, photo sharing accounts, credit card accounts, utilities, medical, etc.

Mission Statement

The Salvation Army, an international movement, is an evangelical part of the universal Christian church. Its message is based on the Bible. Its ministry is motivated by the love of God. Its mission is to preach the gospel of Jesus Christ and to meet human needs in His name without discrimination.

The Salvation Army
Planned Giving Office

P.O. Box 3647
Portland, ME 04104
207-245-3734

www.tsalegacy.org

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