

# 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 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. 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 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)

#### Other Assets: Business and Personal

---

---

---

### 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

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

Congregational Membership

Address

Phone/Web site/e-mail

City

State

Zip

Pastor(s)

### Other People To Contact

Name

Relationship

Phone/e-mail

Name

Relationship

Phone/e-mail

Name

Relationship

Phone/e-mail

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

ELCA Foundation  
8765 West Higgins Road  
Chicago, IL 60631  
773-380-2970  
773-380-2775 fax  
800-638-3522, ext. 2970  
[elcafoundation@elca.org](mailto:elcafoundation@elca.org)

[www.elca.org/foundation](http://www.elca.org/foundation)



**ELCA Foundation**

**Evangelical Lutheran  
Church in America**

God's work. Our hands.