

CHRISTIAN ESTATE PLANNING FORM

HELPING FAMILIES LEAVE A LEGACY OF SIGNIFICANCE



FAMILY NAME: _____

DATE: _____

PHONE: _____

EMAIL: _____

OUR COMMITMENT TO PRIVACY

The Life Institute is committed to maintaining the confidentiality, integrity, and security of personal information for current and prospective clients. All information listed herein is kept in strict confidence and not shared with anyone outside our firm unless required by law. We greatly value our clients' trust and carefully safeguard all financial and legal documents.

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SECURITIES & ADVISORY SERVICES OFFERED THROUGH
GENEOS WEALTH MANAGEMENT, INC. MEMBER FINRA & SIPC

ESTATE PLANNING FORM

Marital Status: Single Married Divorced Widower/Widow Wedding Anniversary: _____

CLIENT INFORMATION

Name (First, Middle Initial, Last)			Age
Street Address	City	State	Zip
Home Phone #	Cell Phone #	Sex	Date of Birth
Email Address		Citizenship	
Occupation	Employer	Business Phone #	

SPOUSE INFORMATION

Name (First, Middle Initial, Last)			Age
Home Phone #	Cell Phone #	Sex	Date of Birth
Email Address		Citizenship	
Occupation	Employer	Business Phone #	

CHILDREN INFORMATION

First Name	Last Name	Sex	Date of Birth	Age	Marital Status	From Prev. Marriage?
1.						
2.						
3.						
4.						
5.						

LEGAL DOCUMENTS

NONE

Date of Last Will: _____ Was it notarized? _____ Notes: _____

Date of Power of Attorney Document: _____ Medical Power of Attorney: _____

Do you have any of the following? Check all that apply. Living Trust Marital Bypass Trust Other Trust Document

What is the purpose of your Trust Document? _____

Do you have a pre-nuptial or other marital agreement to protect children from a first marriage? Yes No N/A

Are there any disabled or special needs children or beneficiaries? Yes No

Are you or your spouse (if applicable) a veteran of the U.S. Armed Forces? Yes No

Christian estate planning boils down to a process of determining to whom, how, and when we will transfer the stewardship of what God has entrusted to us, when the time comes that we cannot serve as the steward ourselves.

LAST WILL & TESTAMENT

- Do you expect or reasonably hope to receive an inheritance? Yes No Uncertain
- How much life insurance do you have for yourself? (include group term from your employer) \$ _____
- How much life insurance do you have for your spouse? \$ _____
- What is the estimated value of your net worth? (include real estate, investments, 401(k), life insurance, etc.) \$ _____

EXECUTOR

Every will must have an executor or personal representative. An executor is a person who will carry out the intent of your will and administer your estate after you die. The executor's duties also include the disbursing of property to the beneficiaries as designated in the will, obtaining information about any other potential heirs, and collecting and arranging payment for estate debts. An executor also makes sure estate taxes are calculated, necessary forms are filed and tax payments are made, and assist the attorney for the estate. Although not legally required in most states, it is usually helpful that the executor live in your home state.

* Name, city, and state of the person you desire to be the primary choice as executor of your estate.

Client's Primary Choice	→	Client's Backup
_____		_____
_____		_____

* If your first choice is unable or unwilling to serve, please name an alternate executor of your estate.

Spouse's Primary Choice	→	Spouse's Backup Choice
_____		_____
_____		_____

GUARDIANSHIP OF MINOR CHILDREN

NOT APPLICABLE

A legal guardian is a person who has the legal authority (and the corresponding duty) to care for the personal and property interests of another person. In your will, you may appoint a legal guardian to raise your minor children (under 18 years old) in your absence. Much care should be taken in choosing an appropriate guardian who will reflect your values and beliefs. Include both spouses if your chosen guardian is married so that each will have authority to act on behalf of the child(ren).

* Name, city, and state of the primary designated guardian for dependent children.

* If your first choice is unable or unwilling to serve, please name an alternate guardian for dependent children.

PROPERTY TRUSTEE FOR POTENTIAL MINOR OR DISABLED BENEFICIARIES (INCLUDING SPOUSE)

If you have named a minor as a potential beneficiary or you have (or could have) minor grandchildren, you should consider designating a trustee to manage the property that the minor stands to inherit. The trustee can be the same individual or a different individual than the one you name as the guardian of your minor children – or your executor can serve in both roles.

Who would you like to designate as Trustee to manage assets?

* Name, city, and state of designated trustee for minor beneficiaries (if applicable).

Primary Trustee	Backup Trustee
_____	_____
_____	_____

At what age(s) should the property be distributed to the minor beneficiary(ies)? 21 25 Other _____

MINISTRY PRIORITIES

Do you wish to include an estate gift to the Lord's work through your local church or other ministry?

Yes No

* If yes, please the name and address below

Ministry Name	Amount
_____	_____
_____	_____
_____	_____

Should these gifts be given immediately at your death or only on the condition that your spouse dies before you?

Immediate Conditional
(At the 2nd death)

* For tax purposes, you may want to make gifts through your 401(k), IRA and Annuity. (Your Financial Advisor can assist with this)

CHURCH AFFILIATION

SEE ABOVE

Church Name: _____

Church Address: _____

Pastor's Name: _____

DISTRIBUTION

Do you wish to include a specific bequest of cash, property, or other item to anyone?

Yes No

Beneficiary & Address	Amount, Percentage, or Item
_____	_____
_____	_____
_____	_____

*Check all of the following options in order of distribution priority.

Do you wish to leave all remaining worldly possessions to your spouse? If your spouse does not survive you (below) Yes No

Do you wish to leave all remaining worldly possessions to your children in equal shares? Or (below) Yes No

The following beneficiaries according to the amounts and/or percentages designated below. Yes No

Beneficiary & Address	Amount, Percentage, or Item
_____	_____
_____	_____
_____	_____

* If a named beneficiary dies before you, the bequest will pass to the children of the deceased beneficiary.

*A clause will be inserted into your will referring to a memorandum that you can later prepare and change/update listing these items and their beneficiary.

CHRISTIAN TESTIMONY OF SALVATION

Do you wish to include your personal testimony of salvation into your personal will? Yes No

* If yes, we will incorporate into your will a statement of Christian testimony and a challenge to your heirs to be good stewards of all that God has given them.

HEALTH CARE POWER OF ATTORNEY / LIVING WILL / ADVANCED DIRECTIVE

In the event that you are determined by health care providers to be incapacitated and unable to provide informed consent to medical treatment and surgical or diagnostic procedures, please designate a primary and backups individual to serve as a health care decision surrogate.

** Name, address, and phone # of the person you desire to be your primary health care agent.*

<i>Client's Primary Choice</i>	→	<i>Client's Backup Choice</i>
_____		_____
_____		_____

** Name, address, and phone # of the person you desire to be your alternate health care agent.*

<i>Spouse's Primary Choice</i>	→	<i>Spouse's Backup Choice</i>
_____		_____
_____		_____

FINANCIAL POWER OF ATTORNEY

A Power of Attorney is a legal document that delegates authority to make financial and legal decisions on your behalf. The power will be granted immediately to whomever you name as your representative. The individual you name as "attorney-in-fact" can be a family member or other adult (need not be a lawyer). The power terminates at death.

** Name, city, and state of the person you desire to be your primary attorney-in-fact.*

<i>Client's Primary Choice</i>	→	<i>Client's Backup Choice</i>
_____		_____
_____		_____

** Name, city, and state of the person you desire to be your alternate attorney-in-fact.*

<i>Spouse's Primary Choice</i>	→	<i>Spouse's Backup Choice</i>
_____		_____
_____		_____

LIVING TRUST

A living trust is a legal document that holds title to various assets, which provides control, management and privacy. Living trusts are known as a will substitute, which avoids many of the normal delays and expenses related to probate. While living trusts are useful and potentially beneficial, most individuals do not need them unless you reside in certain states (ex: California) or own real estate in several states. Those with special needs or a very large estate can also benefit from a living trust. A living trust is more costly to draft and must be funded, otherwise there is little to no benefit of it. A will is still needed when using a living trust. For more information, please speak to your attorney or financial advisor.

ADVISOR NOTES
