



# **Confidential** Estate Planning Guide

Financial  
Planning  
 **Ministry**

## **How to Complete this Form**

To complete this form on your computer, please follow these instructions:

- o Save the booklet to your computer.
- o Use Adobe Reader to ensure your work saves properly.
- o If needed, Adobe Reader can be downloaded for free [here](#).
- o Be sure to save your work.

## **Mac Users**

You must have the Mac version of Adobe Reader to use this form properly.

- o If needed, it may be downloaded for free [here](#).

*Questions? Call us toll free at (800) 871-4901.*



Dear Friend,

For over 35 years, Financial Planning Ministry has removed confusion surrounding estate planning and provided stewardship opportunities to believers at any income level. Today, more than 30,000 families and individuals have benefited from this unique “stewardship through estate planning” ministry. Through our innovative funding model, worthy ministries you support receive much needed future gift income.

Financial Planning Ministry partners with cooperating non-profit ministry organizations that make this ministry possible. *We encourage the inclusion of one or more of these church-related organizations as a beneficiary by gifting a percentage (5% or more) or a generous “cash gift” from your eventual estate distribution. These partner organizations are listed on pages 9–12 of this booklet.*

If you choose not to include any of our listed partners in the final distribution of your estate, you may give an “up-front gift” to Financial Planning Ministry upon the completion of your documents. Your gift will allow us to continue this stewardship ministry for others. Up-front gifts are typically proportionate to your estate value. For example, a \$300,000 estate = \$300.00 gift; a \$2,000,000 estate = \$2,000.00 gift.

**THIS PLANNING GUIDE:** It is important that you provide as much of the requested information as possible. Once you have completed the Planning Guide, please mail it to our office or schedule an appointment through the church seminar you attended in your area.

Questions? Call us toll free at **(800) 871-4901**. To learn more about the stewardship benefits of proper estate planning, *visit our website at [WWW.FPM.ORG](http://WWW.FPM.ORG).*

Thank you for allowing us to assist you with these important life-planning documents!

Sincerely,

A handwritten signature in black ink that reads "Michael Prior". The signature is written in a cursive, flowing style.

Michael Prior, PRESIDENT

Financial Planning Ministry | 2010 Main Street, Suite 100 | Irvine, CA 92614-7265  
Phone: (949) 553-0055 or (800) 871-4901 | Fax: (949) 743-8343 | Email: Trust@fpm.org

# Estate Planning Guide

STEP

1

## Contact Information

DATE

*Please PRINT CLEARLY in ink and be sure to provide LEGAL NAMES.*

NAME

(FIRST)

(MIDDLE)

(LAST)

BIRTH DATE

☐ MALE  
☐ FEMALE

MOBILE PHONE ( )

ALT PHONE ( )

☐ HOME  
☐ WORK  
☐ OTHER

EMAIL ADDRESS

(PRINT CLEARLY — WE PRIMARILY COMMUNICATE BY EMAIL)

ADDRESS

APT/UNIT #

CITY

STATE

ZIP

COUNTY

Is this your primary residence? ☐ YES ☐ NO Are you a U.S. citizen? ☐ YES ☐ NO

What is your marital status? ☐ SINGLE ☐ MARRIED ☐ LEGALLY SEPARATED ☐ DIVORCED ☐ WIDOWED

If married, date of marriage: \_\_\_\_\_

Do you have a pre-nuptial agreement? ☐ YES ☐ NO

Have you and/or your spouse (if married) ever created a Living Trust? ☐ YES ☐ NO

*If yes, please be prepared to submit a complete copy.*

SPOUSE'S NAME

(FIRST)

(MIDDLE)

(LAST)

BIRTH DATE

MOBILE PHONE ( )

ALT PHONE ( )

☐ HOME  
☐ WORK  
☐ OTHER

EMAIL ADDRESS

(PRINT CLEARLY — WE PRIMARILY COMMUNICATE BY EMAIL)

ADDRESS (if different from above)

APT/UNIT #

CITY

STATE

ZIP

COUNTY

Are you a U.S. citizen? ☐ YES ☐ NO

I attended a ☐ SEMINAR ☐ WEBINAR hosted by:

(CHURCH/ORGANIZATION NAME)

(CITY / STATE)

(EVENT CODE)

## STEP

2

## Children of Your Current Marriage

Please list the children of your current marriage. If more space is needed, please turn to page 16.

1) CHILD'S NAME	BIRTH DATE	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
(FIRST) (MIDDLE) (LAST)		
CHILD'S ADDRESS	APT/UNIT #	
CITY, STATE, ZIP	PHONE ( )	
2) CHILD'S NAME	BIRTH DATE	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
(FIRST) (MIDDLE) (LAST)		
CHILD'S ADDRESS	APT/UNIT #	
CITY, STATE, ZIP	PHONE ( )	
3) CHILD'S NAME	BIRTH DATE	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
(FIRST) (MIDDLE) (LAST)		
CHILD'S ADDRESS	APT/UNIT #	
CITY, STATE, ZIP	PHONE ( )	

## STEP

3

## Children of Your Previous Marriages/Relationships

Please list the children of previous marriages including parents' names. If more space is needed, please turn to page 16.

1) CHILD'S NAME	BIRTH DATE	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
(FIRST) (MIDDLE) (LAST)		
CHILD'S ADDRESS	APT/UNIT #	
CITY, STATE, ZIP	CHILD'S PHONE ( )	
PARENTS		
2) CHILD'S NAME	BIRTH DATE	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
(FIRST) (MIDDLE) (LAST)		
CHILD'S ADDRESS	APT/UNIT #	
CITY, STATE, ZIP	CHILD'S PHONE ( )	
PARENTS		
3) CHILD'S NAME	BIRTH DATE	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
(FIRST) (MIDDLE) (LAST)		
CHILD'S ADDRESS	APT/UNIT #	
CITY, STATE, ZIP	CHILD'S PHONE ( )	
PARENTS		

Do any of your children have permanent disabilities? If so, please explain:

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## STEP

4

## Naming a Successor Trustee for Your Trust

If you are creating a joint trust with your spouse, you are both the initial trustees of your trust.

At the death or incapacity of the last trustee (you or your spouse), a **successor trustee** will carry out the wishes and terms of your trust. This person will also serve as the **executor** of your pourover will. Please name the **person/organization** you would like to act in this position. We suggest you list at least one alternate in case the first is unable or unwilling to act.

## 1) PERSON (NOT SPOUSE)

(FIRST)	(MIDDLE)	(LAST)
RELATIONSHIP (and to whom) e.g. Carol's brother's wife		
ADDRESS	APT/UNIT #	CITY, STATE, ZIP
EMAIL ADDRESS		PHONE (      )

## 2) PERSON (NOT SPOUSE)

(FIRST)	(MIDDLE)	(LAST)
RELATIONSHIP (and to whom) e.g. Carol's brother's wife		
ADDRESS	APT/UNIT #	CITY, STATE, ZIP
EMAIL ADDRESS		PHONE (      )

## 3) PERSON (NOT SPOUSE)

(FIRST)	(MIDDLE)	(LAST)
RELATIONSHIP (and to whom) e.g. Carol's brother's wife		
ADDRESS	APT/UNIT #	CITY, STATE, ZIP
EMAIL ADDRESS		PHONE (      )

## STEP

5

## Naming a Health Care Agent

Your **health care agent/conservator** will make your medical decisions in the event that you become disabled and/or mentally incompetent. Your spouse is automatically your first agent unless you specify otherwise. We suggest you list at least one alternate in case your first agent is unable or unwilling to act.

If you are married, do you want your spouse named as first agent? ☐ YES ☐ NO

## HIS ALTERNATE AGENT

(FIRST)	(MIDDLE)	(LAST)
RELATIONSHIP (and to whom) e.g. Carol's brother's wife		
ADDRESS	APT/UNIT #	
CITY, STATE, ZIP		PHONE (      )

## HER ALTERNATE AGENT

(FIRST)	(MIDDLE)	(LAST)
RELATIONSHIP (and to whom) e.g. Carol's brother's wife		
ADDRESS	APT/UNIT #	
CITY, STATE, ZIP		PHONE (      )

## STEP

6

# Naming a Guardian for Your Minor Children

The guardian(s) you name here will care for your minor children if you are unable to do so. They will act as guardians only once they are appointed by a court. Monies from your estate will be available to the guardians for the care of your children until they are age 18.

## 1) GUARDIAN

(FIRST)

(MIDDLE)

(LAST)

RELATIONSHIP (and to whom) e.g. Carol's brother's wife

ADDRESS

APT/UNIT #

CITY, STATE, ZIP

PHONE ( )

If naming co-guardians who are married (i.e. Jack and Jill Smith) and if by death or divorce they are unable to act together:

☐ Either one can act alone

☐ \_\_\_\_\_ can act alone  
NAME OF INDIVIDUAL

## 2) ALTERNATE GUARDIAN

(FIRST)

(MIDDLE)

(LAST)

RELATIONSHIP (and to whom) e.g. Carol's brother's wife

ADDRESS

APT/UNIT #

CITY, STATE, ZIP

PHONE ( )

If naming co-guardians who are married (i.e. Jack and Jill Smith) and if by death or divorce they are unable to act together:

☐ Either one can act alone

☐ \_\_\_\_\_ can act alone  
NAME OF INDIVIDUAL

## STEP

7

# An Overview of Your Estate

Please list the estimated values of your assets. These figures are **CONFIDENTIAL** and **WILL NOT** appear in your Living Trust. Listing these amounts will give us a picture of your total net assets.

Please print **legibly** and in **ink**.

## I. TANGIBLE PERSONAL PROPERTY

Please provide an estimated value of your tangible personal property (automobiles, boats, furniture, jewelry, etc.). Use market value, not replacement value. There is no need to provide a list of these assets.

Total value of personal property \$ \_\_\_\_\_

## II. SAVINGS AND CHECKING ACCOUNTS

Please list your financial institutions and account balances.

1)	ACCOUNT BALANCE \$
2)	ACCOUNT BALANCE \$
3)	ACCOUNT BALANCE \$
4)	ACCOUNT BALANCE \$
5)	ACCOUNT BALANCE \$

Total value of saving(s) and checking accounts \$ \_\_\_\_\_

If more space is needed, please turn to page 16.

## An Overview of Your Estate (CONTINUED)

### III. RETIREMENT BENEFITS

*Please list your retirement benefits and values.*

1) PENSION	DEATH BENEFIT \$
(DO NOT INCLUDE MONTHLY PAYMENTS TO YOU OR SPOUSE)	
2) 401K, 403B, PROFIT SHARING, KEOGH	VALUE \$
3) SPOUSE'S 401K, 403B, PROFIT SHARING, KEOGH	VALUE \$
4) OTHER	VALUE \$
5) IRA(s)	VALUE \$
6) IRA(s)	VALUE \$
7) ANNUITIES	VALUE \$
Total value of retirement benefits \$	

### IV. STOCKS, BONDS, MUTUAL FUNDS, NOTES OR DEEDS OF TRUST

*Please list your investments and current values.*

1)	CURRENT VALUE \$
2)	CURRENT VALUE \$
3)	CURRENT VALUE \$
Total value of stocks, bonds, etc. \$	

### V. LIFE INSURANCE POLICIES

*Please list your life insurance company(ies).*

1)	DEATH BENEFIT AMOUNT \$
CURRENT BENEFICIARIES	TYPE OF POLICY: <input type="checkbox"/> TERM <input type="checkbox"/> WHOLE LIFE
2)	DEATH BENEFIT AMOUNT \$
CURRENT BENEFICIARIES	TYPE OF POLICY: <input type="checkbox"/> TERM <input type="checkbox"/> WHOLE LIFE
3)	DEATH BENEFIT AMOUNT \$
CURRENT BENEFICIARIES	TYPE OF POLICY: <input type="checkbox"/> TERM <input type="checkbox"/> WHOLE LIFE
4)	DEATH BENEFIT AMOUNT \$
CURRENT BENEFICIARIES	TYPE OF POLICY: <input type="checkbox"/> TERM <input type="checkbox"/> WHOLE LIFE



## An Overview of Your Estate (CONTINUED)

### VI. BUSINESS OWNERSHIP

Do you own a business? ☐ YES ☐ NO

Estimated value of business \$ \_\_\_\_\_

Do you want the business assets assigned to the Trust? ☐ YES ☐ NO

*If yes, fill out the information below.*

What type of business is it? ☐ SOLE PROPRIETORSHIP ☐ PARTNERSHIP ☐ S CORPORATION ☐ LLC

☐ OTHER (please specify) \_\_\_\_\_

LEGAL NAME OF BUSINESS

U.S. STATE WHERE BUSINESS WAS FORMED

OWNER NAME(S) AS IT APPEARS ON BUSINESS DOCUMENTS

(FIRST)

(MIDDLE)

(LAST)

YOUR PERCENTAGE OF OWNERSHIP

### VII. REAL PROPERTY

*Please list the addresses and present value of your real property (or mobile home).*

1) \_\_\_\_\_ PRESENT VALUE \$ \_\_\_\_\_

2) \_\_\_\_\_ PRESENT VALUE \$ \_\_\_\_\_

3) \_\_\_\_\_ PRESENT VALUE \$ \_\_\_\_\_

4) \_\_\_\_\_ PRESENT VALUE \$ \_\_\_\_\_

5) \_\_\_\_\_ PRESENT VALUE \$ \_\_\_\_\_

6) \_\_\_\_\_ PRESENT VALUE \$ \_\_\_\_\_

Total value of real property (or mobile home) \$ \_\_\_\_\_

Would you like us to help you begin the process of transferring your real property to your trust? ☐ YES ☐ NO

If yes, for each property:

- Locate your **ownership deed**, commonly named WARRANTY DEED, GRANT DEED, BARGAIN SALE or QUITCLAIM DEED (**NOT** your mortgage deed titled Deed of Trust or Reconveyance).
- Locate your annual county Property Tax **statement**.
- Write the **street address** at the top of each deed and tax statement
- Submit the above pages with this Planning Guide.

*If more space is needed, please turn to page 16.*

## An Overview of Your Estate (CONTINUED)

### VIII. YOUR INDEBTEDNESS

*Please list only the mortgage(s) or debt(s) that exceed \$5,000.*

1)	AMOUNT \$
2)	AMOUNT \$
3)	AMOUNT \$
4)	AMOUNT \$
5)	AMOUNT \$
6)	AMOUNT \$

Total value of indebtedness \$ \_\_\_\_\_

### CURRENT ESTATE EVALUATION SUMMARY

*Please list the totals from sections I through VII.*

i) Total value of personal property	\$
ii) Total value of savings and checking account(s)	\$
iii) Total value of retirement benefits	\$
iv) Total value of stocks, bonds, etc.	\$
v) Total value of life insurance policies	\$
vi) Estimated value of business or share of ownership	\$
vii) Total value of real property and mobile home	\$

A. Total value of sections I–VII \$ \_\_\_\_\_

B. Total value of indebtedness (from section VIII) \$ \_\_\_\_\_

NET VALUE OF YOUR ESTATE (subtract B from A) \$ \_\_\_\_\_

# Charitable Gifts to Ministry Partners

Financial Planning Ministry partners with cooperating non-profit ministry organizations that make this ministry possible. We encourage the inclusion of one or more of these church-related organizations as a beneficiary by gifting a percentage (5% or more) or a generous “cash gift” from your eventual estate distribution.

If you would like more information on these organizations, visit our website at [www.fpm.org](http://www.fpm.org). Gifts to these organizations may be tax deductible — we suggest you consult with your tax professional. Please indicate the percentage or amount below.

Percentage	Camps	Website
_____	Christ In Youth, Joplin, MO	<a href="http://www.ciy.com">www.ciy.com</a>
_____	Round Lake Christian Camp, Lakeville, OH	<a href="http://www.roundlake.org">www.roundlake.org</a>
_____	Wi-Ne-Ma Christian Camp, Cloverdale, OR	<a href="http://www.winema.org">www.winema.org</a>
	<b>Caring/Helping Organizations</b>	
_____	4KIDS of South Florida, Fort Lauderdale, FL	<a href="http://www.4kids.us">www.4kids.us</a>
_____	Atascadero Christian Community, Atascadero, CA	<a href="http://www.pcseniorservices.org">www.pcseniorservices.org</a>
_____	Canton Christian Home, Canton, OH	<a href="http://www.cantonchristianhome.org">www.cantonchristianhome.org</a>
_____	Caring For Miami, Inc., Miami, FL	<a href="http://www.caringformiami.org">www.caringformiami.org</a>
_____	CDF Capital, Irvine, CA	<a href="http://www.cdfcapital.org">www.cdfcapital.org</a>
_____	CDF Capital Foundation, Irvine, CA	<a href="http://www.cdfcapitalfoundation.org">www.cdfcapitalfoundation.org</a>
_____	Christian Care/Fellowship Square, Phoenix, AZ	<a href="http://www.christiancare.org">www.christiancare.org</a>
_____	Christian Children’s Home of Ohio, Wooster, OH	<a href="http://www.ccho.org">www.ccho.org</a>
_____	Christian Financial Resources, Lake Mary, FL	<a href="http://www.cfrministry.org">www.cfrministry.org</a>
_____	Christian Horizons, Springfield, IL	<a href="http://www.christianhorizonsliving.org">www.christianhorizonsliving.org</a>
_____	Christian Stewardship Ministry – Bill Kelley, Laguna Beach, CA	
_____	Clearbrook, Arlington Heights, IL	<a href="http://www.clearbrook.org">www.clearbrook.org</a>
_____	Kairos Benevolence Fund, Irvine, CA	<a href="http://www.kairoslegacypartners.org">www.kairoslegacypartners.org</a>
_____	LivingWell Pregnancy Centers, Orange, CA	<a href="http://www.living-well.org">www.living-well.org</a>
_____	Trinity Services, Inc., New Lenox, IL	<a href="http://www.trinity-services.org">www.trinity-services.org</a>
	<b>Churches</b>	
_____	Abundant Life Church, Damascus, OR	<a href="http://www.alcpnw.com">www.alcpnw.com</a>
_____	Bayside Community Church, Bradenton, FL	<a href="http://www.mybayside.church">www.mybayside.church</a>
_____	Bayside College SEU, Bradenton, FL	<a href="https://seubayside.org">https://seubayside.org</a>
_____	Bayside Bradenton Dream Center, Bradenton, FL	<a href="http://www.thebradentondreamcenter.org">www.thebradentondreamcenter.org</a>
_____	Bethel World Outreach Church, Brentwood, TN	<a href="http://www.bethelworld.org">www.bethelworld.org</a>
_____	Big Valley Christian School, Modesto, CA	<a href="http://www.bvcs.org">www.bvcs.org</a>
_____	Big Valley Grace Community Church, Modesto, CA	<a href="http://www.bigvalleygrace.org">www.bigvalleygrace.org</a>
_____	Calvary Chapel, Fort Lauderdale, FL	<a href="http://www.calvaryftl.org">www.calvaryftl.org</a>
_____	Calvary Christian Church, Bellevue, NE	<a href="http://www.calvary.ch">www.calvary.ch</a>
_____	Camelback Bible Church, Paradise Valley, AZ	<a href="http://www.camelbackbible.com">www.camelbackbible.com</a>
_____	Central Christian Church, Mesa, AZ	<a href="http://www.centralaz.com">www.centralaz.com</a>

(List continued on next page)

## Charitable Gifts to Ministry Partners (CONTINUED)

Percentage	Churches (CONTINUED)	Website
_____	Christ Fellowship, Palm Beach Gardens, FL	<a href="http://www.gochristfellowship.com">www.gochristfellowship.com</a>
_____	Christ Fellowship Miami, Miami, FL	<a href="http://www.cfmiami.org">www.cfmiami.org</a>
_____	Christ's Church of Flagstaff, Flagstaff, AZ	<a href="http://www.ccof.net">www.ccof.net</a>
_____	College Park Church, Indianapolis, IN	<a href="http://www.yourchurch.com">www.yourchurch.com</a>
_____	Community Christian Church, Naperville, IL	<a href="http://www.communitychristian.org">www.communitychristian.org</a>
_____	Community Christian Church, Tamarac, FL	<a href="http://www.communitycc.com">www.communitycc.com</a>
_____	Compass Christian Church, Chandler, AZ	<a href="http://www.compassaz.church">www.compassaz.church</a>
_____	Compass Christian Church, Colleyville, TX	<a href="http://www.mycompasschurch.com">www.mycompasschurch.com</a>
_____	Compassion Christian Church, Savannah, GA	<a href="http://www.compassionchristian.com">www.compassionchristian.com</a>
_____	Cornerstone Christian Church, Wyckoff, NJ	<a href="http://www.cornerstonenj.org">www.cornerstonenj.org</a>
_____	Cornerstone Christian Fellowship, Chandler, AZ	<a href="http://www.cornerstoneonline.com">www.cornerstoneonline.com</a>
_____	Cross Timbers Church, Argyle, TX	<a href="http://www.crosstimberschurch.org">www.crosstimberschurch.org</a>
_____	CrossCity Christian Church, Fresno, CA	<a href="http://www.mycrosscity.com">www.mycrosscity.com</a>
_____	Crossroads Church, Cincinnati, OH	<a href="http://www.crossroads.net">www.crossroads.net</a>
_____	CrossWay Christian Church, Nashua, NH	<a href="http://www.crosswaycc.org">www.crosswaycc.org</a>
_____	Eagle Brook Church, Centerville, MN	<a href="http://www.eaglebrookchurch.com">www.eaglebrookchurch.com</a>
_____	Eastern Star Church, Indianapolis, IN	<a href="http://www.easternstarchurch.org">www.easternstarchurch.org</a>
_____	First Baptist Orlando, Orlando, FL	<a href="http://www.firstorlando.com">www.firstorlando.com</a>
_____	First Orlando Foundation, Orlando, FL	<a href="http://www.firstorlandofoundation.com">www.firstorlandofoundation.com</a>
_____	Gateway Church, Southlake, TX	<a href="http://www.gatewaypeople.com">www.gatewaypeople.com</a>
_____	Grace Church, Noblesville, IN	<a href="http://www.gracechurch.us">www.gracechurch.us</a>
_____	Kensington Community Church, Troy, MI	<a href="http://www.kensingtonchurch.org">www.kensingtonchurch.org</a>
_____	Lakewood Church/Joel Osteen Ministries, Houston, TX	<a href="http://www.lakewoodchurch.com">www.lakewoodchurch.com</a>
_____	LCBC Church (Lives Changed By Christ), Manheim, PA	<a href="http://www.lcbcchurch.com">www.lcbcchurch.com</a>
_____	Lutheran Church of Hope, West Des Moines, IA	<a href="http://www.lutheranchurchofhope.org">www.lutheranchurchofhope.org</a>
_____	Mountain Christian Church, Joppa, MD	<a href="http://www.mountaincc.org">www.mountaincc.org</a>
_____	NewPointe Community Church, Dover, OH	<a href="http://www.newpointe.org">www.newpointe.org</a>
_____	NorthRidge Church, Plymouth, MI	<a href="http://www.northridgechurch.com">www.northridgechurch.com</a>
_____	Northview Church, Indianapolis, IN	<a href="http://www.northviewchurch.us">www.northviewchurch.us</a>
_____	ONE&ALL Church, San Dimas, CA	<a href="http://www.ccvsoal.com">www.ccvsoal.com</a>
_____	Parkview Christian Church, Orland Park, IL	<a href="http://www.parkviewchurch.com">www.parkviewchurch.com</a>
_____	Pathway Church, Wichita, KS	<a href="http://www.pathwaychurch.com">www.pathwaychurch.com</a>
_____	Real Life Christian Church, Clermont, FL	<a href="http://www.real.life">www.real.life</a>
_____	Redemption Church, Gilbert, AZ	<a href="http://www.redemptionaz.com">www.redemptionaz.com</a>
_____	Resurrection Life (ResLife) Church, Grandville, MI	<a href="http://www.reslife.org">www.reslife.org</a>
_____	Rock Church, San Diego, CA	<a href="http://www.sdrock.com">www.sdrock.com</a>
_____	Rocky Mountain Christian Church, Niwot, CO	<a href="http://www.rocky.church">www.rocky.church</a>
_____	Saddleback Church, Lake Forest, CA	<a href="http://www.saddleback.com">www.saddleback.com</a>

## Charitable Gifts to Ministry Partners (CONTINUED)

Percentage	Churches (CONTINUED)	Website
_____	Seacoast Church, Mount Pleasant, SC	<a href="http://www.seacoast.org">www.seacoast.org</a>
_____	Shepherd Church, Porter Ranch, CA	<a href="http://www.shepherdchurch.com">www.shepherdchurch.com</a>
_____	Shepherd's Grove Presbyterian Church, Irvine, CA	<a href="http://www.sgp.church">www.sgp.church</a>
_____	Southeast Christian Church, Louisville, KY	<a href="http://www.southeastchristian.org">www.southeastchristian.org</a>
_____	Southland Christian Church, Lexington, KY	<a href="http://www.southlandchristian.org">www.southlandchristian.org</a>
_____	Sun Valley Community Church, Gilbert, AZ	<a href="http://www.sunvalleycc.com">www.sunvalleycc.com</a>
_____	Ten Mile Christian Church, Meridian, ID	<a href="http://www.tenmilecc.com">www.tenmilecc.com</a>
_____	The Chapel, Getzville, NY	<a href="http://www.thechapel.com">www.thechapel.com</a>
_____	The Church of Eleven22, Jacksonville, FL	<a href="http://www.coe22.com">www.coe22.com</a>
_____	The Crossing Church, Las Vegas, NV	<a href="http://www.thecrossinglv.com">www.thecrossinglv.com</a>
_____	The Orchard Evangelical Free Church, Arlington Heights, IL	<a href="http://www.theorchardefc.org">www.theorchardefc.org</a>
_____	The Orchard Ministry Development, Barrington, IL	<a href="http://www.orchardministrydevelopment.org">www.orchardministrydevelopment.org</a>
_____	The Summit Church, Durham, NC	<a href="http://www.summitchurch.com">www.summitchurch.com</a>
_____	The Tabernacle, Orchard Park, NY	<a href="http://www.thetabernacleop.org">www.thetabernacleop.org</a>
_____	The Vineyard Church of Central Illinois, Urbana, IL	<a href="http://www.thevineyardchurch.us">www.thevineyardchurch.us</a>
_____	True North Church, Mullica Hill, NJ	<a href="http://www.truenorth.cc">www.truenorth.cc</a>
_____	Vienna Presbyterian Church, Vienna, VA	<a href="http://www.viennapres.org">www.viennapres.org</a>
_____	Vineyard Cincinnati, Cincinnati, OH	<a href="http://www.vineyardcincinnati.com">www.vineyardcincinnati.com</a>
_____	Vineyard Columbus, Westerville, OH	<a href="http://www.vineyardcolumbus.org">www.vineyardcolumbus.org</a>
_____	Ward Church, Northville, MI	<a href="http://www.ward.church">www.ward.church</a>
_____	West Side Christian Church, Springfield, IL	<a href="http://www.wschurch.org">www.wschurch.org</a>
	<b>Educational Institutions</b>	
_____	Boise Bible College, Boise, ID	<a href="http://www.boisebible.edu">www.boisebible.edu</a>
_____	Calvary Christian Academy, Fort Lauderdale, FL	<a href="http://www.ccaeagles.org">www.ccaeagles.org</a>
_____	Central Christian College of the Bible, Moberly, MO	<a href="http://www.cccb.edu">www.cccb.edu</a>
_____	Christ Fellowship Academy, Inc., Miami, FL	<a href="http://www.cfacademy.org">www.cfacademy.org</a>
_____	Florida Baptist Foundation, Jacksonville, FL	<a href="http://www.floridabaptist.org">www.floridabaptist.org</a>
_____	Great Lakes Christian College, Lansing, MI	<a href="http://www.glcc.edu">www.glcc.edu</a>
_____	Johnson University, Knoxville, TN (formerly Johnson Bible College)	<a href="http://www.johnsonu.edu">www.johnsonu.edu</a>
_____	Johnson University, Kissimmee, FL (formerly Florida Christian College)	<a href="http://www.johnsonu.edu">www.johnsonu.edu</a>
_____	Manhattan Christian College, Manhattan, KS	<a href="http://www.mccks.edu">www.mccks.edu</a>
_____	Mid-Atlantic Christian University, Elizabeth City, NC (formerly Roanoke Bible College and Eastern Christian College)	<a href="http://www.macuniversity.edu">www.macuniversity.edu</a>
_____	St. Louis Christian College, Florissant, MO	<a href="http://www.stlchristian.edu">www.stlchristian.edu</a>
_____	The King's University, Southlake, TX	<a href="http://www.tku.edu">www.tku.edu</a>
_____	Valley Christian Schools, Chandler, AZ	<a href="http://www.vchsaz.org">www.vchsaz.org</a>

(List continued on next page)

## Charitable Gifts to Ministry Partners (CONTINUED)

Percentage	Missions/Evangelistic/Outreach Organizations	Website
_____	Christ In Youth, Joplin, MO	www.ciy.com
_____	CMF International, Indianapolis, IN	www.cmfi.org
_____	Jack Hayford Ministries, Southlake, TX	www.jackhayford.org
_____	Jewish Voice Ministries International, Phoenix, AZ	www.jewishvoice.org
_____	Mission Aviation Fellowship, Nampa, ID	www.maf.org
_____	Oregon Christian Evangelistic Fellowship, Grants Pass, OR	www.ocefchurchplanters.com
_____	Pioneer Bible Translators, Dallas, TX	www.pioneerbible.org
_____	SAT-7 USA, Easton, MD	www.sat7usa.org
_____	The P.E.A.C.E. Plan, Lake Forest, CA	www.thepeaceplan.com
_____	Unlocking the Bible, Barrington, IL	www.unlockingthebible.org
_____	World Vision, Federal Way, WA	www.worldvision.org
<b>Broadcasting Ministries</b>		
_____	The JOY FM – Florida	https://florida.thejoyfm.com
_____	The JOY FM – Georgia	https://georgia.thejoyfm.com
_____	The JOY FM – Alabama	https://alabama.thejoyfm.com
_____	HIS Radio	https://hisradio.com
_____	HIS Radio, WRTP	https://hisradiowrtp.com
_____	88.3 WAFJ	https://wafj.com
_____	88.3 The Wind	https://thewind.radio
_____	89.1 KWFC	https://kwfc.org

**Your Church** – In addition to leaving a gift to one or more of the above partners, we also encourage you to remember your church in your estate distribution (if not already selected above).

\_\_\_\_\_ **CHURCH NAME**

\_\_\_\_\_ **ADDRESS**

\_\_\_\_\_ **CITY**

\_\_\_\_\_ **STATE**

\_\_\_\_\_ **ZIP**

**Financial Planning Ministry** – Should you choose not to include any of our partner organizations in your estate, then a gift to Financial Planning Ministry is appreciated. Gifts to Financial Planning Ministry will allow us to continue this ministry for others.

\$ \_\_\_\_\_

**1) GIVE NOW (AS AN UP-FRONT GIFT)**

Up-front gifts are typically proportionate to your estate value.

For example, a \$300,000 estate = \$300.00 gift; a \$2,000,000 estate = \$2,000.00 gift.

They are usually paid upon receipt of your documents.

% \_\_\_\_\_

**2) GIVE UPON YOUR PASSING (AS AN ESTATE GIFT)**

This gift will be given to Financial Planning Ministry at the time of your death. We recommend designating a percentage amount (5%, 10%, 15%...), as the value of your estate will change over time.

# Estate Distribution to Your Children, Family, Friends and Others

After debts and gifts to ministry are paid, I direct the balance of my estate to be distributed to the following individuals (your beneficiaries) as follows. This section **must add up to 100%**.

**EXAMPLE:** *Richard and Jane have three children. Thomas is married with children. Sarah is married and plans to have children in the future. Andrew (18) is unmarried and has no children. Here's the predecease order of preference for each of their children.*

Thomas (1/3)

1 BENEFICIARY'S SURVIVING CHILDREN\* 2 YOUR SURVIVING CHILDREN\* OTHER: \_\_\_\_\_

Sarah (1/3)

1 BENEFICIARY'S SURVIVING CHILDREN\* 2 YOUR SURVIVING CHILDREN\* OTHER: \_\_\_\_\_

Andrew (1/3)

1 BENEFICIARY'S SURVIVING CHILDREN\* 2 YOUR SURVIVING CHILDREN\* OTHER: \_\_\_\_\_

## 1) BENEFICIARY

AMOUNT / PERCENTAGE

(FIRST)

(MIDDLE)

(LAST)

RELATIONSHIP (and to whom) e.g. Carol's brother's wife

ADDRESS

APT/UNIT #

CITY, STATE, ZIP

PHONE ( )

If this beneficiary dies before you, this share will go to (please number your choices in succession):

\_\_\_\_\_ BENEFICIARY'S SURVIVING CHILDREN\* \_\_\_\_\_ YOUR SURVIVING CHILDREN\* OTHER: \_\_\_\_\_

## 2) BENEFICIARY

AMOUNT / PERCENTAGE

(FIRST)

(MIDDLE)

(LAST)

RELATIONSHIP (and to whom) e.g. Carol's brother's wife

ADDRESS

APT/UNIT #

CITY, STATE, ZIP

PHONE ( )

If this beneficiary dies before you, this share will go to (please number your choices in succession):

\_\_\_\_\_ BENEFICIARY'S SURVIVING CHILDREN\* \_\_\_\_\_ YOUR SURVIVING CHILDREN\* OTHER: \_\_\_\_\_

## 3) BENEFICIARY

AMOUNT / PERCENTAGE

(FIRST)

(MIDDLE)

(LAST)

RELATIONSHIP (and to whom) e.g. Carol's brother's wife

ADDRESS

APT/UNIT #

CITY, STATE, ZIP

PHONE ( )

If this beneficiary dies before you, this share will go to (please number your choices in succession):

\_\_\_\_\_ BENEFICIARY'S SURVIVING CHILDREN\* \_\_\_\_\_ YOUR SURVIVING CHILDREN\* OTHER: \_\_\_\_\_

\*The word "children" includes both biological and adopted children.

If more space is needed, please turn to page 16.

# Estate Distribution to Your Children, Family, Friends and Others (CONTINUED)

## SPECIAL DISTRIBUTION (OPTIONAL)

Unless you specify otherwise, your children will receive their inheritance as a lump sum. Minors must wait to inherit until they have reached the age of majority (18 in most states).

If you would rather your children receive their shares at a specific age and/or in multiple distributions over time, please complete this section. Funds will be held in trust and administered by the trustee accordingly.

Select one option:

☐ **OPTION A**

Make monies available for continuing education and associated expenses.

At age 25 provide them with 50% of the remainder, and the balance at age 30.

☐ **OPTION B**

Make monies available for continuing education and associated expenses.

At age \_\_\_\_\_ provide them with \_\_\_\_\_% of the remainder, and the balance at age \_\_\_\_\_.

## DISTRIBUTION OF TANGIBLE PERSONAL PROPERTY

You will be able to name specific distributions of tangible personal property (jewelry, furniture, automobiles, etc.) in a handwritten attachment (Schedule C) that we will send with your Trust. There is no need to provide us with a list of these assets.



# Document Election and Disclosure

Financial Planning Ministry is not a law firm. We provide legal information, not legal advice. Through this guide, you are requesting our assistance in completing estate planning forms at your specific direction.

Our purpose is to facilitate biblical stewardship for the support of Christian churches, institutions and agencies. Should we determine that your request for any reason falls outside the scope of our non-profit service, we will return your planning guide to you immediately along with suggested resources more appropriate to your request.

- ☐ I/We choose to have an estate plan prepared as a revocable living trust and understand that a pourover will, health care directive and financial power of attorney are included.

**OR**

- ☐ I/We choose to have an estate plan prepared as a standard last will and testament and understand that probate is likely. A health care directive is included. A financial power of attorney is available upon request.

*SIGN OR TYPE YOUR FULL NAME BELOW.*

SIGNATURE

DATE

SIGNATURE

DATE

## REVIEWING YOUR PLANNING GUIDE

Please take a moment to review your Planning Guide. Any missing or unclear information or instructions will delay the processing of your documents.

- ☐ The Planning Guide is filled out **completely**.
- ☐ The writing is **legible** and in **ink**.
- ☐ Any **supporting documents are attached** (i.e. each property deed should be stapled to its corresponding tax statement, with the street address clearly written on the deed).

## SUBMITTING YOUR PLANNING GUIDE

Select the method that applies to you.

**TELEPHONE APPOINTMENT** | Email this booklet to your consultant.  
(See appointment confirmation email for consultant's email address.)

**IN-PERSON APPOINTMENT** | Bring this booklet and supporting documents with you.

**NO SCHEDULED APPOINTMENT** | Send this booklet directly to the FPM office:  
MAIL: Financial Planning Ministry, 2010 Main Street, Suite 100, Irvine, CA 92614  
FAX: (949) 743-8343  
EMAIL: Trust@fpm.org

*Please use this space for any additional entries.*

**Financial Planning Ministry**

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