



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,

Since 1982, Financial Planning Ministry has removed confusion surrounding estate planning and provided stewardship opportunities to believers at any income level. Today, more than 38,000 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: So our team can effectively assist you, it is important that you provide as much of the requested information as possible.

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***.

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

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:

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)

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

2) PERSON (NOT SPOUSE)

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

3) PERSON (NOT SPOUSE)

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

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

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

HER ALTERNATE AGENT

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

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 \$
<small>(DO NOT INCLUDE MONTHLY PAYMENTS TO YOU OR SPOUSE)</small>	
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 <i>(from section VIII)</i> \$ _____	
NET VALUE OF YOUR ESTATE <i>(subtract B from A)</i> \$ _____	

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. 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	www.ciy.com
_____	Round Lake Christian Camp, Lakeville, OH	www.roundlake.org
_____	United Christian Youth Camp, Prescott, AZ	www.ucyc.com
_____	Wi-Ne-Ma Christian Camp, Cloverdale, OR	www.winema.org
Caring/Helping Organizations		
_____	4KIDS of South Florida, Fort Lauderdale, FL	www.4kids.us
_____	Blessings of Hope, Ephrata, PA	www.blessingsofhope.com
_____	Canton Christian Home, Canton, OH	www.cantonchristianhome.org
_____	Caring For Miami, Inc., Miami, FL	www.caringformiami.org
_____	CDF Capital, Irvine, CA	www.cdfcapital.org
_____	CDF Capital Foundation, Irvine, CA	www.cdfcapitalfoundation.org
_____	Christian Care/Fellowship Square, Phoenix, AZ	www.christiancare.org
_____	Christian Financial Resources, Lake Mary, FL	www.cfrministry.org
_____	Christian Horizons, Springfield, IL	www.christianhorizonsliving.org
_____	Elliott Library and Museum (CCL Foundation), Cincinnati, OH	www.ccleadership.org
_____	Family Research Council, Washington DC	www.frc.org
_____	Kairos Benevolence Fund, Irvine, CA	www.kairoslegacypartners.org
_____	LivingWell Pregnancy Centers, Orange, CA	www.living-well.org
_____	Trinity Foundation, New Lenox, IL	www.trinityfoundation-nfp.org
Churches		
_____	Abundant Life Church, Damascus, OR	www.alcpnw.com
_____	Bayside Community Church, Bradenton, FL	www.mybayside.church
_____	Bayside College, Bradenton, FL	www.baysidecollege.org
_____	Bayside Bradenton Dream Center, Bradenton, FL	www.thebradentondreamcenter.org
_____	Bethel World Outreach Church, Brentwood, TN	www.bethelworld.org
_____	Big Valley Christian School, Modesto, CA	www.bvcs.org
_____	Big Valley Grace Community Church, Modesto, CA	www.bigvalleygrace.org
_____	Calvary Chapel, Fort Lauderdale, FL	www.calvaryftl.org
_____	Calvary Christian Church, Bellevue, NE	www.calvary.ch
_____	Camelback Bible Church, Paradise Valley, AZ	www.camelbackbible.com
_____	Central Christian Church, Mesa, AZ	www.centralaz.com
_____	Christ Fellowship, Palm Beach Gardens, FL	www.gochristfellowship.com
_____	Christ Fellowship (Miami), Miami, FL	www.cfmiami.org
_____	Christ's Church of Flagstaff, Flagstaff, AZ	www.ccof.net
_____	College Park Church, Indianapolis, IN	www.yourchurch.com
_____	Community Christian Church, Naperville, IL	www.communitychristian.org
_____	Community Christian Church, Tamarac, FL	www.communitycc.com

(List continued on next page)

Charitable Gifts to Ministry Partners (CONTINUED)

Percentage	Churches (CONTINUED)	Website
_____	Compass Christian Church, Colleyville, TX	www.mycompasschurch.com
_____	Compassion Christian Church, Savannah, GA	www.compassionchristian.com
_____	Connection Pointe Christian Church, Brownsburg, IN	www.connectionpointe.org
_____	Cornerstone Christian Church, Wyckoff, NJ	www.cornerstonenj.org
_____	Cornerstone Christian Fellowship, Chandler, AZ	www.cornerstoneonline.com
_____	Cross Timbers Church, Argyle, TX	www.crosstimberschurch.org
_____	Crossroads Church, Cincinnati, OH	www.crossroads.net
_____	Eagle Brook Church, Centerville, MN	www.eaglebrookchurch.com
_____	Eastern Star Church, Indianapolis, IN	www.easternstarchurch.org
_____	Fellowship Bible Church of Little Rock, Little Rock, AR	www.fellowshipar.com
_____	Fellowship Bible Church of NWA, Rogers, AR	www.fellowshipnwa.org
_____	First Baptist Church of Dallas, Dallas, TX	www.firstdallas.org
_____	First Baptist Orlando, Orlando, FL	www.firstorlando.com
_____	First Orlando Foundation, Orlando, FL	www.firstorlandofoundation.com
_____	Flatirons Community Church, Lafayette, CO	www.flatironschurch.com
_____	Gateway Church, Southlake, TX	www.gatewaypeople.com
_____	Grace Bible Church of Arroyo Grande, Arroyo Grande, CA	www.gracebibleag.com
_____	Grace Church, Noblesville, IN	www.gracechurch.us
_____	Heritage Baptist Church, Lynchburg, VA	www.hbclynchburg.com
_____	Idlewild Baptist Church, Lutz, FL	www.idlewild.org
_____	Kensington Community Church, Troy, MI	www.kensingtonchurch.org
_____	Lakewood Church/Joel Osteen Ministries, Houston, TX	www.lakewoodchurch.com
_____	LCBC Church (Lives Changed By Christ), Manheim, PA	www.lcbcchurch.com
_____	Lutheran Church of Hope, West Des Moines, IA	www.lutheranchurchofhope.org
_____	Magnify Church, Rockford, MI	www.magnifychurch.org
_____	Mount Pleasant Christian Church, Greenwood, IN	www.mpcc.info
_____	Mountain Christian Church, Joppa, MD	www.mountaincc.org
_____	New Day Christian Church, Port Charlotte, FL	www.ndcchurch.com
_____	NorthRidge Church, Plymouth, MI	www.northridgechurch.com
_____	Northview Church, Indianapolis, IN	www.northviewchurch.us
_____	ONE&ALL Church, San Dimas, CA	www.ccvsocial.com
_____	Pantano Christian Church, Tucson, AZ	www.pantano.church
_____	Parkview Christian Church, Orland Park, IL	www.parkviewchurch.com
_____	Pathway Church, Wichita, KS	www.pathwaychurch.com
_____	Real Life Christian Church, Clermont, FL	www.real.life
_____	Redemption Church, Gilbert, AZ	www.redemptionaz.com
_____	Resurrection Life (ResLife) Church, Grandville, MI	www.reslife.org
_____	Rock Church, San Diego, CA	www.sdrock.com
_____	Rocky Mountain Christian Church, Niwot, CO	www.rocky.church
_____	Rolling Hills Community Church, Franklin, TN	www.rollinghills.church
_____	Saddleback Church, Lake Forest, CA	www.saddleback.com
_____	Seacoast Church, Mount Pleasant, SC	www.seacoast.org
_____	Shepherd Church, Porter Ranch, CA	www.shepherdchurch.com
_____	Shepherd's Grove Presbyterian Church, Irvine, CA	www.sgp.church

Charitable Gifts to Ministry Partners (CONTINUED)

Percentage	Churches (CONTINUED)	Website
_____	Southeast Christian Church, Louisville, KY	www.southeastchristian.org
_____	Southland Christian Church, Lexington, KY	www.southlandchristian.org
_____	St. Paul Lutheran Church, Trenton, MI	www.splconline.com
_____	Sun Valley Community Church, Gilbert, AZ	www.sunvalleycc.com
_____	Ten Mile Christian Church, Meridian, ID	www.tenmilecc.com
_____	The Chapel, Getzville, NY	www.thechapel.com
_____	The Church of Eleven22, Jacksonville, FL	www.coe22.com
_____	The Crossing Church, Las Vegas, NV	www.thecrossinglv.com
_____	The Orchard Evangelical Free Church, Arlington Heights, IL	www.theorchardefc.org
_____	The Orchard Ministry Development, Barrington, IL	www.orchardministrydevelopment.org
_____	The Summit Church, Durham, NC	www.summitchurch.com
_____	The Tabernacle, Orchard Park, NY	www.thetabernacleop.org
_____	The Vineyard Church of Central Illinois, Urbana, IL	www.thevineyardchurch.us
_____	Trinity Church, South Bend, IN	www.tefs.org
_____	True North Church, Mullica Hill, NJ	www.truenorth.cc
_____	Vienna Presbyterian Church, Vienna, VA	www.viennapres.org
_____	Vineyard Cincinnati, Cincinnati, OH	www.vineyardcincinnati.com
_____	Vineyard Columbus, Westerville, OH	www.vineyardcolumbus.org
_____	Ward Church, Northville, MI	www.ward.church
_____	West Side Christian Church, Springfield, IL	www.wschurch.org
_____	Whitewater Crossing Christian Church, Cleves, OH	www.lfoundhope.com
_____	Willow Creek Community Church, South Barrington, IL	www.willowcreek.org
_____	Woodmen Valley Chapel, Colorado Springs, CO	www.woodmenvalley.org
Educational Institutions		
_____	Boise Bible College, Boise, ID	www.boisebible.edu
_____	Calvary Christian Academy, Fort Lauderdale, FL	www.ccaeagles.org
_____	Central Christian College of the Bible, Moberly, MO	www.cccb.edu
_____	Christ Fellowship Academy, Inc., Miami, FL	www.cfacademy.org
_____	Concordia University Irvine, Irvine, CA	www.cui.edu
_____	Crean Lutheran High School, Irvine, CA	www.creanlutheran.org
_____	Flatirons Academy, Westminster, CO	www.flatironsacademy.org
_____	Florida Baptist Foundation, Jacksonville, FL	www.floridabaptist.org
_____	Great Lakes Christian College, Lansing, MI	www.glcc.edu
_____	Johnson University, Knoxville, TN <i>(formerly Johnson Bible College)</i>	www.johnsonu.edu
_____	Johnson University, Kissimmee, FL <i>(formerly Florida Christian College)</i>	www.johnsonu.edu
_____	Manhattan Christian College, Manhattan, KS	www.mccks.edu
_____	Mid-Atlantic Christian University, Elizabeth City, NC <i>(formerly Roanoke Bible College and Eastern Christian College)</i>	www.macuniversity.edu
_____	Real Life Christian Academy, Clermont, FL	www.rlcacademy.com
_____	Russell School of Ministry, Cincinnati, OH	www.rsministry.org
_____	The King's University, Southlake, TX	www.tku.edu
_____	Valley Christian Schools, Chandler, AZ	www.vchsaz.org

(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
_____	Eagles' Wings, Clarence, NY	www.eagleswings.org
_____	Heart for Lebanon, Black Mountain, NC	www.heartforlebanon.org
_____	International Disaster Emergency Service (IDES), Noblesville, IN	www.ides.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
_____	Young Life, Colorado Springs, CO	www.younglife.org
Radio/Broadcasting Ministries		
_____	HIS Radio	https://hisradio.com
_____	HIS Radio, WRTP	https://hisradiowrtp.com
_____	Radio Training Network, Greenville, SC	www.radiotrainingnetwork.com
_____	The JOY FM – Florida	https://florida.thejoyfm.com
_____	The JOY FM – Georgia	https://georgia.thejoyfm.com
_____	The JOY FM – Alabama	https://alabama.thejoyfm.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. By submitting this guide, you are requesting our assistance in completing estate planning forms at your specific direction.

This establishes a confidential relationship between yourself and FPM, whose services are provided by FPM alone. FPM does not charge a fee for its services, but instead strongly encourages you to include a voluntary gift to one or more of their ministry partners through your estate plan.

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, healthcare 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 healthcare directive and financial power of attorney are included.

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

2010 Main Street, Suite 100
Irvine, California 92614-7265

800.871.4901 PHONE

949.553.0055 PHONE

949.743.8343 FAX

info@fpm.org EMAIL

www.fpm.org