

Confidential Estate Inventory and Profile for Life Planning Seminar of The Idlewild Foundation The Road Ahead: Your Life, Your Choices and God's Will

October 23, 2016

Please prepare this profile in advance of the seminar. That will assist you in fully understanding the information that will be presented and will help you prepare questions that can be asked during the seminar.

This does not obligate you to take any action or incur any cost but is designed to make this seminar more meaningful and helpful.

CONFIDENTIAL ESTATE INVENTORY AND PROFILE

NAME:						
	First	Middle	Last			
RESIDEN	TIAL ADDRESS:					
CITY:	STATE:					
ZIP:	COUN	VTY:				
DATE OF	BIRTH:					
Please tell	us your preferred method	of contact below				
□ Best pho	one number:					
□ Second b	est phone number:					
□ Email ad	ldress:					
MARITAI	L STATUS: □ Single □ M	arried \square Separated \square Divor	ced □ Widowed			
If you are	currently married, please p	provide the following inform	mation regarding your spouse:			
NAME:						
	First	Middle	Last			
DATE OF	BIRTH:					
Do you wa	ant your spouse's will to m	nirror yours?	□ NO			
•	•	-	our Christian faith? Please not that e in the body of a will or trust.			
□ YES	\square NO					
Have you 1	previously had a will or tr	ust prepared for you?				
□ YES	\square NO					
Please beg your famil		you might wish to leave as	s a legacy statement of your faith to			

PERSONAL REPRESENTATIVE

A Personal Representative (previously an Executor) is an individual who will act on behalf of the estate to begin and during probate proceedings. Your Personal Representative is given access to all of the property in your estate, including all money and accounts, therefore, the selection of a fully trustworthy person is very important; it is wise to appoint someone who has complete integrity and, if possible, business experience, to serve as your Personal Representative. As a result, your Personal Representative is the person you *trust* to carry out your wishes.

Your Personal Representative's duties may include, among others:

Offering and proving your will in probate court;

Collecting and inventorying your estate property;

Paying bills, collecting debts and handling your estate funds;

Filing federal tax returns;

Providing an accounting to the probate court:

Selling or dividing your estate property;

Managing your estate property during the time it is in probate; and

Distributing the assets of your estate to the people legally entitled to receive them under the terms of your will.

We strongly recommend you identify a successor Personal Representative.

	•	±
PERSONAL REPRESENT	ATIVE: (We recomme	nd your spouse)
NAME:		
CITY:		STATE:
ZIP:		
1ST SUCCESSOR PERSO	NAL REPRESENTAT	IVE:
NAME:		
CITY:		STATE:
ZIP:		

You may wish to consider a second alternative personal representative. It is not necessary but it could make revision your will unnecessary in the event of the unexpected death, incapacity or unwillingness of your first or second choices for Personal Representative. Planning ahead can save substantial money.

CHILDREN

First	Middle	Las	t	DOB	Gender
First	First Middle First Middle		Last		Gender
First					Gender
First	Middle	Las	t	DOB	Gender
First	Middle	Las	Last		Gender
First	Middle	Las	t	DOB	Gender
Do any of your ch	ildren have any disabilit	y?	□ YES	□ NO	
Are you and your □ NO	spouse both the biologic	al parents of a		amed childre	en? □YES
First	Middle	Last	Parents	Age	Gender
First	Middle	Last	Parents	Age	Gender
First	Middle	Last	Parents	Age	Gender
First	Middle	Last	Parents	Age	Gender
First	Middle	Last	Parents	Age	Gender
First	Middle	Last	Parents	Age	Gender
 First	Middle —	Last	Parents	- <u>———</u>	Gender

APPOINTMENT OF PROPERTY TRUSTEE FOR MINORS:

In the event that your spouse is deceased at the time of your death, you may wish to make your wishes known as the individual you would like to administer your property for the benefit of any minor children.

Please take note that your Trustee is also given access to all of the property in your Trust estate, including all money and accounts, therefore, the selection of a fully trustworthy person is very important; it is wise to appoint someone who has complete integrity and, if possible, business experience, to serve as your Trustee. Your Trustee is the person you *trust* to carry out your wishes.

- The Trustee is a "fiduciary" of the estate and the beneficiaries of your will. It is a substantial and important responsibility.
- The Trustee will have a responsibility to always act within the best interests of the Trust estate and beneficiaries of the Trust.
- The Trustee is required to act in accordance with the probate code.
- The Trustee must prepare an accounting of all property that passes through the estate. This accounting will be reviewed by the probate court.
- The Trustee will administer your funds for your children's health, education, support care, comfort, and maintenance in the manner you have stated and in accordance with the law until the age designated by you.

TRUSTEE:	
CITY:	STATE:
SUCCESSOR TRUSTEE:	
CITY:	STATE:

You may wish to consider a second alternative trustee. It is not necessary but it could make redoing your will unnecessary in the event of the unexpected death, incapacity or unwillingness of your first or second choices for trustee. Planning ahead can save substantial money.

Please consider the age at which you would want the remainder of your children's inheritance to be distributed?

ALTERNATIVE BENEFICIARIES

Do you wish to leave a portion of your entire estate to a charity or ministry? Please list the name of the charity or ministry, their location, and the percentage of your estate you would like them to receive. Name State City % Name City State % Name City State % Name City State % Begin to make a list of items such as jewelry, silver, china, art, and other personal items that you might wish to specifically give, if any, to a particular person. Do you want to leave your entire estate to your spouse? □ YES \sqcap NO If you spouse does not survive you, then do you want to leave your entire estate to be distributed equally among your children? \square YES □ NO If not, how would you want the estate distributed? If your spouse and children do not survive you, do you want your estate to be distributed equally among your grandchildren? □ YES □ NO If not, how would you want the estate distributed?

Do you have any special instructions, concerns or questions, including specific bequests you would like to give to a specific person?					