



ENDURING LOVE  
FOUNDATION  
— Est. 2002 —

*Where your gift keeps on giving*

# WELCOME!

*We're glad you're here*





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# Make A Will Protect Your Legacy



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# Agenda

- Introduction to the Enduring Love Foundation
- Remarks by Dr. Jerry Carlisle, President TX Baptists Missions Foundation
- Make A Will Workshop



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# Know Your Foundation I

## Board of Directors

***Mr. Geoff Morrison, Director***

***Mr. Bobby Jones, Vice-Chairman***

***Mrs. Ann Parsons, Director***

***Mr. Dennis Becker, Treasurer***

***Mr. Thom Griffith, Director***

***Mrs. Barbara Miller, Secretary***

***Mr. Steve Miller, Director***

***Mr. Nathan Sherman, Chairman***



# Know Your Foundation II

## Our Purpose

*We exist to bring pleasure, praise and people to God through a permanent endowment fund for the duration of this world.*



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# Know Your Foundation III

- Founded in 2002
- Wholly owned by First Baptist Church Universal City
- Manages an endowment fund for the sole benefit of FBCUC
- Gifts are never spent, they are invested for eternity
- Board of Directors elected by FBCUC
- Fund's current value is ~ \$1.5 million
- Returned more than \$700,000 to FBCUC



# How is the Money Used I

***Spending is jointly authorized by Ministerial Staff and Finance  
Committee***

- **Loving Up!** – Funds were expended to support Baptist LAMB mission offering and missions including development of our church plant in Haiti, support of church starts in Tacoma, Portland, Schertz (Impact Church) and New York City.



# How is the Money Used II

- **Loving Out!** – Funds were spent on outreach benevolence to our church and community to include Resources for Women Crisis Pregnancy Center, national and international world hunger relief including Feed My Starving Children.





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# How is the Money Used III

- **Loving In!** – Funding provided for internal ministries such as the Spanish and Recreation ministries and most recently the Wellness Initiative, the purchase of land and development of Communion Park and Communion Garden, along with numerous physical plant upgrades and expansions including the Playground and Audio and Video related equipment.



## New Initiative – Legacy Stewardship

- Most American adults have no will.
- We have partnered with FreeWill.com to offer you the opportunity to create a legally binding will at no cost.
- Our goal is that 100% of our church family, their loved ones, neighbors and friends will create a will and other crucial documents to avoid the unneeded stress of death without a will.



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**64%**

of Americans believe  
having a will is important

**34%**

of Americans have a will  
or estate plan



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# *Why Are We Reluctant to Create A Will?*



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## *Common Reasons*

1. Procrastination
2. Not enough assets
3. Don't know how
4. Too expensive
5. No heirs
6. Too complicated
7. Economic uncertainty
8. Uncomfortable with lawyers
9. Don't want to think about death



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# Making a plan can be easy

The Enduring Love Foundation offers our community a free online will-writing tool

- ✓ No cost to you
- ✓ Available from the comfort of your home
- ✓ Creates a legal will customized to your wishes
- ✓ Can be paired with an attorney for complex estates
- ✓ Creates an Advanced Health Care Directive, Medical Power of Attorney and Durable Power of Attorney
- ✓ Can be changed in the future



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## Planning is essential

Protect your family  
Prepare for your future  
Pass on *your* values and your valuables

### ***Option 1: Intestate Succession***

- Die without a will
- Government makes decision on property distribution and guardianship
- Most costly and time consuming

*OR*

### ***Option 2: Last Will & Testament***

- Name the people and ministries you want to receive your assets
- Nominate guardians, executors and administrators who share your faith and values and who you trust to handle your final affairs
- Designate healthcare and financial proxy through additional documents



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## ➤ Dr. Jerry Carlisle

- President, TX Baptists Missions Foundation





**TEXAS BAPTISTS<sup>®</sup>**

**The Missions Foundation**

*God's Mission. Your Legacy.*



Where there's a will...



Where there's a will...

Get in it!



What does it take to  
“get in” a will?



# What does it take to “get in” a will?

- Relationship





# What does it take to “get in” a will?

- Relationship
- Resources



# What does it take to “get in” a will?

- Relationship
- Resources
- Written Record



# What does it take to “get in” a will?

- Relationship
- Resources
- Written Record
- Death





# What does it take to “get in” a will?

- Relationship
- Resources
- Written Record
- Death
- Executor



This, then, is how you should pray:

“Our Father in heaven,  
hallowed be your name,  
your kingdom come,  
your will be done  
on earth as it is in heaven.  
Give us today our daily bread.”

**MATTHEW 6:9-11 (NIV)**



The world and its desires  
pass away,  
But the man who does  
the will of God  
lives  
forever.

**I JOHN 2:17 (NIV)**



God has a will...



God has a will...

*Are you* in it?





God's will is His way to:



# God's will is His way to:

- Provide for His family



# God's will is His way to:

- Provide for His family
- Preserve and pass on His blessings





# God's will is His way to:

- Provide for His family
- Preserve and pass on His blessings
- Perpetuate His purpose for the future



What does it take to  
“get in” God’s will?



# What does it take to “get in” God’s will?

- Relationship



# What does it take to “get in” God’s will?

- Relationship
- Resources



# What does it take to “get in” God’s will?

- Relationship
- Resources
- Written Record





# What does it take to “get in” God’s will?

- Relationship
- Resources
- Written Record
- Death



# What does it take to “get in” God’s will?

- Relationship
- Resources
- Written Record
- Death
- Executor



God has a will...





God has a will...

*Are you in it?*



Does God have a place...



Does God have a place...  
in *your* will?



Your will is your way to:



# Your will is your way to:

- Provide for your family





# Your will is your way to:

- Provide for your family
- Preserve and pass on God's blessings



# Your will is your way to:

- Provide for your family
- Preserve and pass on God's blessings
- Perpetuate God's purpose for the future







**TEXAS BAPTISTS<sup>®</sup>**

**The Missions Foundation**

*God's Mission. Your Legacy.*





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***BREAK***



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# Make-A-Will

➤ FreeWill Workshop



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**This presentation is not intended to give legal or  
tax advice.**

Please consult your professional advisors about  
your specific situation.



***CREATE YOUR WILL  
Absolutely Free!***

First Baptist Church of Universal City and the  
Enduring Love Foundation  
is making this tool available at no cost to you

[EnduringLoveFoundation@fbcuc.org](mailto:EnduringLoveFoundation@fbcuc.org)



# To access the Enduring Love Foundation FreeWill.com Site:

- <http://www.freewill.com/enduringlovefoundation>
- Or Scan the QR Code







## WILLS

Click here to prepare your Last Will and Testament.



## POWER OF ATTORNEY

Click here to prepare your Power of Attorney.



## MEDICAL DIRECTIVES

Click here to prepare your Medical Directives. (Note: Does not include a HIPAA release-feature coming soon)



## BENEFICIARIES

Click here to prepare your Beneficiary documents.



Start here to create estate planning documents that fit the unique needs of your family

- Will
- Self proving affidavit
- AHCD
- POA
- Mirror will

Use email to set up account



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freewill.com/[enduringlovefoundation] ↻

**FREEWILL** For individuals For nonprofits For lawyers About us Log in Get Started

At First Church we do life together. The good times and the bad, the easy topics and the difficult. Because we know God calls us to be good stewards of our finances and leaders of a family, we must plan for the end of our life. Because we yours today totally free

able for you to create

**FREEWILL** ... ...

### A gift for you and your future

As a thank you for being a friend of First Church, FreeWill is delighted to help you create your legal will. It's 100% free to you, and most people finish in 20 minutes or less. [We also offer you the ability to create a free revocable living trust.](#)

**Start my free will**

August is Make-A-Will Month

Just 20 minutes to create a legally-binding will

**Get started now**

Already included us in your will? Let us know by filling out [this form](#).



## Basic details

Full legal name



Preferred name (Optional)

Email address



Click Here for Help

# LAST WILL & TESTAMENT



## Basic details continued

Gender

Male  Female

Birthdate

Month  Day  Year

Click Here for Help





## Estate planning options

Are you legally married?\*

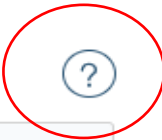


You will be given the option to create a Mirror Will for your spouse at the Review stage of the will-making process.

Spouse's first name\*

Spouse's middle name

Spouse's last name\*



Previous

Save & Continue

### Help: Are you legally married?



Your will should accurately reflect your situation at the time that you sign it. For example: If you are separated but not officially divorced, you would be considered married and should answer "Yes". If you are engaged but not officially married, you would be considered single and should answer "No". It is generally a good idea to make a new will when your marital status changes.

It is generally a good idea to update your estate plan when your marital status changes.

Close

BASICS

NOMINEES

VISIONS

REVIEW


Estate planning

Are you le




# Aligning guardianship considerations with your faith

1. Shared belief in Jesus
2. Personal and moral values
3. Parenting philosophy
4. Emotional and physical well-being
5. Lifestyle and support network

freewill.com/enduringlovefoundation 

## Children and Guardianship of Minors

Do you have any children? 

Yes  No


What are the full legal names of your children?

Holly Winther-Hansen

[Click to add another](#)

Are any of your children under the age of 18?

Yes  No

If your minor child is left parentless when you pass away, who would you like to be the child's guardian? 

Example Relative  Sibling   [Delete](#)

[Click to add another](#)

Do you have any pets you would like to provide for in your will?\*

 Yes No

Please enter a name and description (eg: Felix the black cat), and species for each pet:\*



[Delete](#)

Click to add another

How much money would you like to provide for your pets' needs (food, veterinary costs, etc)?



In order of preference, who should be responsible for taking care of your pets if you pass away?\*



[Delete](#)



[Delete](#)

Click to add another





### List your major assets (optional)

[Skip for now →](#)

Listing out major assets helps your executor better handle your affairs by providing information about what assets you have and where they're held.








**Assets distributed by your will (probate)**

- Bank accounts solely owned by you
- Real estate solely owned by you or by tenants in common
- Brokerage accounts solely owned by you
- Personal property or valuables

**Assets NOT distributed through your will (non-probate)**

- Jointly owned bank or brokerage accounts
- Jointly owned real estate or vehicle
- 401(k) accounts, pensions, IRAs, etc.
- Life insurance

### Select an asset to add

 Financial account	 Retirement account	 Life insurance	 Real estate
 Vehicle	 Brokerage account	 Cash / valuables	



## What is the approximate total value of assets distributed by your will?

This question helps us understand your estate value in relation to state and federal tax law. We may provide additional guidance throughout your estate planning process depending on your response. This estimate should not include any assets distributed outside of your will (e.g. Joint accounts, 401(k) accounts, life insurance, etc.).

Less than \$200k	\$200K-500K	\$500K-\$1M	\$1M-\$2M
\$2M-\$5M	\$5M-\$10M	More than \$10M	

Previous

Save & Continue

## LAST WILL & TESTAMENT



### Assets

Listing out major assets helps your executor better handle your affairs by providing information about what assets you have and where they're held. This section may take a while but is completely optional. You can choose to skip this section and return to it later.

How would you like to provide your assets?\*

I'd like to list out each of  
my assets

I'll estimate my total  
assets for now

Previous

Save & Continue



# Gifts in Wills

## Good for those who:

- Want to make an enduring impact
- Wish to retain control of assets during life
- Appreciate a gift option that costs nothing now

## Gifts in wills can be funded with:

- Cash – a specific amount or a % of the estate's remainder
- Real estate or personal property

Fairly easy to establish – and can be changed at any time

A ministry can be a primary beneficiary (first in line) or contingent (second or third in line)



## Leave a gift to Enduring Love Foundation

FreeWill is free to you because of the support of organizations such as Enduring Love Foundation that work on meaningful issues. Will you consider leaving a gift in support of a cause that is important to you? Click 'No thanks' if you don't want to leave any gifts to charity at this time.

The purpose of the Enduring Love Foundation is to bring pleasure, praise and people to God through a permanent endowment fund for the duration of this world. The intent of the fund is to augment our regular tithes and offerings through special gifts and legacy stewardship. Gifts received by the Foundation are permanently restricted for the sole purpose of being invested to produce income to finance FBCUC mission activities. This website represents an expansion of our mission to provide a means through which 100% of our congregation can ensure peace of mind and the security of their families by preparing legacy documents without cost. Founded in 2002, the endowment has provided more than \$658,000 to support a myriad of FBCUC missions and activities, including development of our church plant in Haiti, support of church starts in Tacoma, Portland, Schertz and New York City, the purchase of land and development of Communion Park and Communion Garden, outreach benevolence to our church and community to include Crisis Pregnancy Center and World Hunger, along with other similar projects. The Foundation is “Where Your Gifts Keep on Giving”.



Many Christians like to leave gifts to charity in their will. Will you join them?

1/23/2024 Enduring Love Foundation	Name a designation	Choose another nonprofit
------------------------------------	--------------------	--------------------------

Leave a gift to Enduring Love Foundation
✕

What type of gift would you like to leave to Enduring Love Foundation?\*

Percentage of residuary estate (%)

Fixed cash amount (\$)

How much of your residual estate will you leave to Enduring Love Foundation?\*

5%	10% <small>Most common</small>	20%	30%
40%	50%	100%	Other

Leave a message to Enduring Love Foundation

Cancel

Save & Exit

BASICS

NOMINE

VISIONS

REVIEW

## Leave a gift to

FreeWill is free to you that work on meaning important to you? Click

The purpose of the Enduring Love Foundation is to provide a permanent endowment to support the activities, including de Portland, Schertz and and Communion Garden Pregnancy Center and Your Gifts Keep on Gi





## LAST WILL & TESTAMENT



### Summary of gifts to nonprofits

GIFT DESCRIPTION	BENEFICIARY	
10% of residual estate	Enduring Love Foundation - Enduring Love Foundation	<a href="#">Edit</a> <a href="#">Delete</a>

### Want to leave another gift?


Enduring Love Foundation	Name a designation	Choose another nonprofit
--------------------------	--------------------	--------------------------

Previous

Save & Continue

# LAST WILL & TESTAMENT



Will you make the work of nonprofits easier by letting them know who you are? 

Anonymous gifts may be less helpful to nonprofits because they often cannot be included in planned giving goals.

Previous

Save & Continue

## Primary beneficiaries of your residual estate

A primary beneficiary is first in line to inherit property when you pass away.

### Who should inherit your residual estate when you pass away?\*



You will be able to specify on the next page what will happen if any of the beneficiaries specified below do not survive you.

Leave the rest to my spouse, Angelica Beatrice Planner

Split evenly among my children, else to their respective descendants

Create a custom plan

### Please specify one or more beneficiaries below

Your distribution must equal exactly 100% to continue

BENEFICIARY

ALLOCATION

Enduring Love Foundation - Enduring Love Foundation

10%

[Edit](#)

Add Person

Add Charity


Your total distribution must equal 100%

10%



## Secondary beneficiaries of your residual estate

A secondary beneficiary (also known as an alternate, or contingent, beneficiary) will inherit property only if the primary beneficiary or beneficiaries do not survive you.

If your spouse, Angelica Beatrice Planner does not survive you, to whom should their portion of the estate go? 

Split evenly among my children, else to their respective descendants

Leave it to charity

Create a custom plan

Previous

Save & Continue

## Funeral Wishes

Here you can choose to include wishes for your funeral and final resting place. The wishes you enter will provide instructions to your funeral executor, but please note that they will not be legally binding. It is recommended that you keep these instructions separate from your estate planning documents, as these instructions usually need to be acted upon quickly prior to asset distribution.

In order of preference, who will be responsible for carrying out your funeral and final resting place instructions?

[Delete](#)

[Click to add another](#)

What are your wishes for your funeral service?

If you have specific requests, please annotate them here or provide the location of a reference document.

You can use this space to leave a message.

What are your wishes for your body and final resting place?

If you have made provision for your body's final resting place, you may enter that information here.

You can use this space to leave a message.

# LAST WILL & TESTAMENT



## Executors of your Will

Nominating an executor\*

Angelica Beatrice Planner	Spouse	▼	<a href="#">Delete</a>
Robert John Planner	Relative	▼	<a href="#">Delete</a>

A red circle highlights a question mark icon in the top right corner of the form area.

Previous

Save & Continue

# Digital Executors

Your digital executor's primary responsibility is to distribute your digital assets to the beneficiaries that you specify. In order to fulfill this responsibility, your digital executor will have the power to access, download, and backup digital assets, convert file formats, access to any devices as necessary to manage digital assets, to clear computer caches and to delete files.

By default, your estate's executor will also serve as your digital executor. Would you like to nominate someone else to act as your digital executor instead?\*

In order of preference, what is the full legal name of the person who will be your digital executor?\*



Joseph Arthur Planner

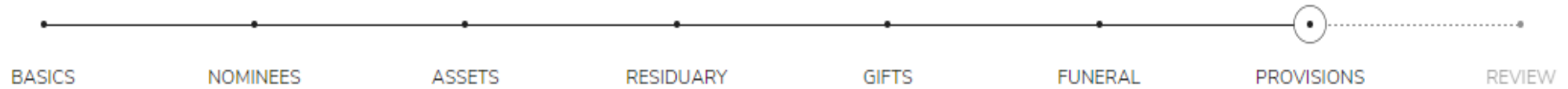
Child

[Delete](#)

[Click to add another](#)

Would you like your digital executor to have access to the contents of your electronic communications?\*





## No contest clause

A “no-contest clause” is a provision that discourages challenges to your estate plan. It states that anyone who baselessly challenges the distributions you've made will be treated as though they've predeceased you—in other words, they will not receive any gifts you have left them.

Would you like to include a no-contest clause in your documents?\*

Yes

No



Previous

Save & Continue



## Self-proving Affidavit

Do you want to add a self-proving affidavit to your Will?\*

You will need to sign your will in the presence of a notary public for the self-proving affidavit. However, adding one can reduce the burden on your witnesses to prove the validity of your will and speed up the probate process for your loved ones.

[Learn more about self-proving affidavits](#)

Yes

No

Previous

Save & Continue

# LAST WILL & TESTAMENT



## Third Witness

Do you want to have three witnesses sign your will?\*



Previous

Save & Continue

## Independent Administration

Illinois, Missouri, Texas, Louisiana, California, and Nevada permit independent administration of estates, largely free of court supervision. This means that after an executor is approved and an inventory of the estate's assets is filed with the court, the executor can administer the estate with minimal further court involvement or supervision. For example, an executor can settle claims by creditors, sell assets for the payment of taxes, and distribute property to estate beneficiaries, all without the court's oversight or approval. Even if your state does not currently permit independent administration, you can still include language authorizing it in your will if you like - that way, if your state law someday changes, or you move to one of the states that do permit it, your wishes will be clear.

Would you like to give permission for your estate to be administered independent of court supervision?\*



Yes

No

Say Nothing

Previous

Save & Continue

## Personal Statement

If you would like, you can choose to attach an additional personal statement to your will. Some use this space to document their spiritual or moral values for their next-of-kin, leave a letter to their children or loved ones, provide additional messages for beneficiaries of gifts, or simply to write about their life experiences.

Please note that this is not a legally binding document. Please do not use this space to leave gifts to your beneficiaries.

Would you like to attach a personal statement to your will?\*

Please write your personal statement below\*

## LAST WILL & TESTAMENT

BASICS      NOMINEES      ASSETS      RESIDUARY      GIFTS      FUNERAL      PROVISIONS      REVIEW

### Review your responses

Please review everything on this page to make sure it is in accordance with your wishes. If you would like to change anything, click the “Edit” button on the corresponding section.

#### Basic Information

WILLMAKER NAME	Joe E Planner
WILLMAKER GENDER	Male
SPOUSE NAME	Angelica Beatrice Planner
MARITAL STATUS	Married
ADDRESS	4905 Nowhere Lane Paradise, TX 78148
APPROX. VALUE OF ASSET TRANSFER	\$200K - \$500K

Edit

## Mirror Wills

Mirror Wills are Wills made by two individuals (most commonly spouses or partners) with similar wishes for the distribution of their estates. When your Will is mirrored, your spouse's name will replace your name and vice versa. Mirror Wills generally aren't suitable for couples with different wishes or if there are children from prior relationships.

[Learn more about Mirror Wills](#)

If you listed a nonprofit as a primary beneficiary in your Will, the gift will also appear in your spouse's Will as a part of the mirroring process. This will result in two identical gifts, one made upon your passing and one made upon your spouse's passing. Please review your plan and [click here if you need to make any adjustments](#) (e.g., gift amount).

Do you want to create a one-time will for your spouse?\*

By selecting "Yes", the Mirror Will and profile for your spouse will be created under this FreeWill account. Subsequent changes made to either document will not be reflected in the other.

Yes

No

Previous

Save & Continue





# You're almost done! Follow these instructions to make your will legally valid.

---

## Read

- Read your will carefully, and make sure you understand everything.
- If there's anything you feel like you don't understand, please speak with a lawyer.

---

## Sign

- Find two witnesses and a notary. Your witnesses must be at least 14, mentally competent, and someone other than the notary. Neither witness, nor their spouses, should receive any gifts in your will.
- You and your witnesses must sign and date your will in the same session.
- While in the presence of your witnesses and notary, verbally acknowledge that this is your Last Will and Testament. For example, you could say: "This is my Last Will and Testament that I am signing and it represents my wishes for the distribution of my property at the time of my death." Then:

# **Last Will and Testament of John Adam Smith**

I, John Adam Smith, of Red Oak, TX, declare this to be my Will, and I revoke all Wills and Codicils previously made by me.

## **Article I: Declarations**

- A. **Marital Status** - As of the date of this Will, I am married to Peggy Sue Smith.
- B. **Children** - As of the date of this Will, I have no living children.

## **Article II: Executor Provisions**

- A. **Executor** - I nominate my friend Major Payne to serve as Executor of my estate and to carry out the instructions in this Will.
- B. **Bond & Court Supervision** - No bond or other security shall be required of my Executor or Digital Executor in any jurisdiction. To the extent permitted by the laws of the state in which my Will is probated, my Executor shall have the authority to administer my estate without court supervision, and no action shall be required in any court in relation to the settlement of my estate other than the probating and recording of my Will.
- C. **Executor Powers** - I grant to my Executor the following powers:
  - 1. The power to exercise all powers of an absolute owner of property;

## Finalize your last will and testament

A message from Enduring Love Foundation:

For questions about the FreeWill process, please contact us at [enduringlovefoundation@fbcuc.org](mailto:enduringlovefoundation@fbcuc.org) or visit our website <https://www.fbcuc.org/enduring-love-foundation>.

### Last will & testament

Your will is ready to be made official! Download a PDF or, if you already have a verified account on FreeWill, email a copy to yourself. Once you've printed it out, just follow the included instructions to sign and finalize it.

[Download your will](#)

[Email your will](#)

Prefer to see an attorney?

[Download a point summary of your will](#) to review with an attorney. This can save you both time and money!

Resources

- [Reasons you might want an attorney](#)
- [American Bar Association Attorney Finder](#)
- [ACTEC Fellow Search](#)
- [Avvo](#)
- [Our FreeWill Fellows](#)

Looking for a better way to support your favorite nonprofits now?

Giving stock is one of the most tax-advantageous ways to give during your lifetime. Your gift can be up to 20% larger because you avoid capital gains tax and most donors can also claim an income tax deduction for the stock's full market value. It's a win-win way to support the causes you love!

## Notify nominees

We'll send an email to the nominees named in your will summarizing their roles and responsibilities.

[Enter nominee emails](#)

## Sign your will in front of your witnesses

You and your witnesses must sign and date your will in the same session. Then store it somewhere safe and let your executors know where they can find it.

[Mark as done](#)

## Review Angelica's last will and testament

Save time by getting both your and Angelica's will signed and witnessed at the same time. To make changes to their will, or to download their point summary, [switch profiles](#).

Download

Email

## Create an Advance Healthcare Directive (Living Will)

Take the lead on your end-of-life medical care decisions. Make a plan now, so your family can respect your wishes.

[Get started](#)

## Create a Durable Financial Power of Attorney (DFPOA)

Name a person you trust to make decisions about your property and finances if you're unable to do so.

[Get started](#)

## Create a beneficiary plan

Document and distribute assets that your will does not cover, including 401(k)s, IRAs, and life insurance policies.





*Where your gift keeps on giving*