**PREPARATION FOR YOUR CHRISTIAN ESTATE PLANNING APPOINTMENT**

To prepare for your appointment with the Washington Conference Planned Giving representative, you will find it most helpful to have the following information already considered and available:

1. Who would you like to name on your will as your personal representative? *That is the person who will follow your instructions in the will and place your property and your money where you have so designated in your will.*
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ First Choice
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Second Choice
4. Who would you like to have the guardianship of any minor children you have? *That is the person who you would want to care of your children; to protect, raise, and provide Christian influence, if you cannot.*
5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ First Choice
6. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Second Choice
7. Do you want another person to manage your assets/funds in trust for you children, or do you want the guardian to do that? If another person, who would that be?

A. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ First Choice

B. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Second Choice

1. Who would you like to be your Financial Power of Attorney for you, if for some reason you are not able to manage your affairs? They can pay your bills, sell your assets, buy for you, manage your bank account, etc. This needs to be someone you greatly trust.

A. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ First Choice

B. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Second Choice

1. Who would you like to make health care decisions about you, if you were unconscious or unable to answer questions of a doctor or hospital? Name a first and second choice.

A. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ First Choice

B. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Second Choice

1. Consider your specific desire to benefit the Lord’s work in the WA Conference through your estate plan. We can discuss and develop this plan further in our appointment.