

Planning for your future is an important task.

A good plan prevents accidental disinheritance and ensures that your family is protected and provided for after you are gone. The decision to create a will or trust depends on your assets, beneficiaries and goals. This brochure is designed to help you think through the planning options and determine what's best for you.

If you have questions about creating a plan or need an attorney referral, please contact us. We look forward to helping you create the right plan for you and your family's future.



I have reviewed your brochure and:

- I would like information on wills and estate planning.
- Please refer me to a qualified estate planning attorney.
- I would like to receive a **FREE** Wills Guide.
- I have already included your organization in my will.

Name _____

Street _____

City _____

State/Zip _____

Home Phone _____

E-mail _____

(Please complete and return. All inquiries are treated with complete confidentiality.)

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.



Desert Southwest

UNITED METHODIST FOUNDATION

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Do You Need A WILL Or LIVING TRUST?



Why Create a Will?

A will is a signed and witnessed document that describes where you want your property to go. Many people first create a will in order to appoint a guardian to care for minor children in their absence. A will is also the place where you appoint an executor to manage the administration of your estate. The benefit of a will is that it is revocable, which means that you can make changes at any time. However, there are many reasons why you might choose to instead create a living trust.

6 REASONS

You Might Want a Living Trust



1. PRESERVE PRIVACY

A will is a public document everyone can read, whereas a trust is private.

2. AVOID PROBATE

Unlike a trust, a will is subject to probate which can be time consuming and costly.

3. PROPERTY MANAGEMENT

Unlike a will, a living trust provides for a trustee to manage your property.

4. ASSET PROTECTION

A trust can be created with provisions to protect your assets from creditors.

5. CAPACITY PLANNING

A trust enables you to plan in the event you can no longer care for yourself.

6. DEPENDENTS

A trust allows you to distribute income to children and care for special needs.



Create Your Own Legacy

Whether you choose to create a will or living trust plan, there are a number of ways that you can include our charity in your plan and create a legacy to be remembered. One of the easiest ways to fulfill your charitable goals and help continue our work is through a bequest. Your attorney can draft language making a gift to us of a specific asset, percentage of your estate or the residue (what's left after specific bequests are made to your family).

Another option is to create a tax deductible gift which will provide lifetime income to a family member or friend. For additional information on planning options or to receive a free attorney referral, please contact us. We look forward to helping you create your legacy!