

HOW CAN WE HELP YOU?

- ☐ I would like information about creating a will.
- ☐ I am interested in information on charitable income and estate plans.
- ☐ I would like to learn about living trusts.
- ☐ I have already included your organization in my estate plan.

Street _____

City _____

State/Zip _____

Phone _____

Email _____

1. Please tear off this portion of the brochure and complete the form.
2. Place it in an envelope and mail it to us.

Alternatively, you can reach us using any of the following:

Email: agreen@dsumf.org

Phone: 602-798-8202

Online: dsumf.org/resources

(All inquiries are treated with complete confidentiality.)

WHAT HAPPENS IF I PASS AWAY WITHOUT AN ESTATE PLAN?

A will might cost a minimum of three to four hundred dollars. But the cost of dying intestate, meaning without a will, can easily be more than that sum. Someone who dies intestate must have a court approve the settlement of their estate. This can be very expensive — sometimes costing tens of thousands of dollars. Planning today can help save costs and better provide for your family and future.



Cut along this line.

CONTACT US TODAY!

To learn more about how to create a plan for your future contact us by phone or email, or reply by returning the attached form.



Desert Southwest
UNITED METHODIST FOUNDATION
602.798.8202 | www.dsumf.org
1300 South Litchfield Road, Suite 110B, Goodyear, AZ 85338

DO YOU HAVE QUESTIONS FOR YOUR ESTATE PLANNING ADVISOR

If you are like many people, you have a lot of questions about planning for the future.



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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.

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HOW TO PREPARE FOR MEETING WITH YOUR ESTATE PLANNING ATTORNEY

Whether you are meeting with an attorney to discuss your first will or trust or to revise your existing estate plan, there are some ways you can begin to prepare for your meeting today.

1. Write down a list of questions you have for your attorney. Thinking through your needs and goals in advance helps to ensure that the meeting with your attorney is efficient and effective.
2. Gather and organize your information. Complete our free Wills Guide or use the online Wills Planner available on our website to document information about your family, assets and goals.
3. Review our website for planning ideas. Learn about the ways you can provide for your family, create gifts of income, save on taxes and benefit our organization with your plan.

WHY DO YOU NEED A WILL?

1. A will can help you decide who will receive your property.
2. You can appoint a guardian for your minor children in your will.
3. A will allows you to appoint an executor to administer your estate.
4. A will can help reduce taxes for your heirs and your estate.

DO YOU NEED A LIVING TRUST?

A living trust operates much like a will but it has several added benefits. A person can transfer assets to the trust and continue to manage property during his or her lifetime. Unlike a will, the provisions of a living trust document remain confidential. When an individual passes away, a living trust typically allows for an estate to be settled in less time than if there is a will. An appointed trustee will pay any debts and make distributions based on the terms of the trust document without the need for court approval.

DO YOU NEED A HEALTHCARE POWER AND A LIVING WILL?

A durable power of attorney for healthcare allows you to select the person who can make healthcare decisions for you if you are no longer able to care for yourself. The person you select could make decisions for you regarding hospitalization, treatment and second opinions.

Another healthcare related document is a living will, sometimes called an advanced directive. This document helps you make decisions about extraordinary measures, pain management, feeding and nutrition, or other care as you near your final hours of life.



WHEN DO YOU NEED TO MAKE CHANGES TO YOUR PLAN?

If you have recently experienced a life changing event such as a marriage, a death in the family or the birth of a child or grandchild, you should consider talking with an attorney to update your estate plan.

