

## Estate Planning Kit

The heart of this kit is authoritative information on estate planning. Two booklets from the American Bar Association—*Estate Planning: Getting Started* and *Revocable Living Trusts*—provide that kind of information at reasonable cost. You can order the booklets using the form found below. (If your support comes from donors living in one state, your state bar association may have similar materials. In California, the state bar offers three booklets: *Do I Need Estate Planning?*, *Do I Need a Will?* and *Do I Need a Living Trust?* The order form for the California booklets is found at the end of this section. Make sure these materials conform to the laws of your state.

### Cover Letter for Estate Planning Kit

Dear \_\_\_\_\_,

Thank you for requesting our organization's Estate Planning Kit. You will feel a great sense of satisfaction and relief when your Will or Trust is completed. The Kit will help you take the first steps toward that goal. It includes:

- \* Information from the Bar Association on basic estate planning;
- \* An Estate Planning Inventory Form to help you get a clearer notion on the worth of your estate;
- \* Information on How To Remember Our Organization in Your Will.

Our organization wants you to have effective estate plans: Wills and/or Trusts that are properly worded, signed, witnessed, and not contradicted by other binding arrangements you may have made.

Effective estate planning usually takes time, effort and a good attorney, but in the end your plan will allow your family to avoid the delay, dissension and needless expense that often occurs when a loved one dies without an estate plan.

Once you have taken care of your family's needs, please consider a thoughtful bequest to our organization. Bequests are essential to the future of our work. If you have any questions about the enclosed, please call (name and number of contact person).

Sincerely,



4. Grandchildren

Age

Parent

(1) \_\_\_\_\_

(2) \_\_\_\_\_

(3) \_\_\_\_\_

(4) \_\_\_\_\_

(5) \_\_\_\_\_

(6) \_\_\_\_\_

(7) \_\_\_\_\_

(8) \_\_\_\_\_

(9) \_\_\_\_\_

(10) \_\_\_\_\_

(11) \_\_\_\_\_

(12) \_\_\_\_\_

The following is meant to give your attorney a good idea of the total value of your estate. Knowing your total worth is important to determine the type of estate plan that will keep your estate tax as low as possible.

5. REAL ESTATE INFORMATION

Description and location	Market Value	Debt
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
<b>TOTAL:</b>		\$ _____
<b>(Total value of real estate = market value less debt)</b>		

6. PERSONAL PROPERTY *Please list approximate current value:*

Automobile(s): \$ \_\_\_\_\_

Savings and Checking Accounts: \$ \_\_\_\_\_

Stocks/Bonds \$ \_\_\_\_\_

Household Furnishings \$ \_\_\_\_\_

Other Personal Assets \$ \_\_\_\_\_

7. Death Benefits from Insurance \$ \_\_\_\_\_

8. Military Service Death Benefits \$ \_\_\_\_\_

9. Expected inheritance \$ \_\_\_\_\_

10. **TOTAL VALUE OF ESTATE:** \$ \_\_\_\_\_  
**(Add all of the above, including total real estate value)**

11. Executor \_\_\_\_\_ Alternate \_\_\_\_\_

12. Funeral Arrangements \_\_\_\_\_

\_\_\_\_\_

**13. BENEFICIARY INFORMATION:**

<u>Names of Persons or Charitable Organizations</u>	<u>Bequest</u> Dollars Amount or <u>% of Estate</u>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____
11. _____	_____
12. _____	_____
13. _____	_____
14. _____	_____

## **HOW TO REMEMBER OUR ORGANIZATION IN YOUR WILL**

One advantage of giving by Will is the flexibility it offers. Four of the most popular forms bequests can take are:

**A fixed amount of money or a designated property:**

"I give to (legal name and tax identification number), located in (City), (State),  
\$ \_\_\_\_\_ (or describe the real or personal property, including exact location.)

**A percentage of the estate:**

"I give to (legal name and tax identification number), located in (City), (State), \_\_\_\_\_%  
of my estate."

**A residual bequest:**

"I give all the residue of my estate, including real and personal property, to (legal name and  
tax identification number), located in (City), (State).

**A double-purpose bequest.** You can provide a relative or friend with income for life through a special gift to our organization. You can do this by establishing a charitable trust through your Will. Upon your death, the trust pays income to the person you designate. After that person's death, whatever remains in the trust passes to our organization. Call our organization at (phone) for further information.

If you wish to have your bequest applied to a specific program, simply add "...for the benefit of (name of program)" to the language suggested above.

**Consult an attorney when preparing legal documents.**

### Brochure Order Form—For Office Use Only

Please send me the client brochure packages indicated below. *Packages include 50 brochures of one design.*

No of packages	Brochure Title	Price
_____	Estate Planning: Getting Started (5430102)	\$ 49.95
_____	Revocable Living Trusts (5430103)	\$ 49.95
<b>Quantity discount on 10 or more packages; each package</b>		<b>\$ 39.95</b>

\*\*Handling: Orders up to \$49.99 add \$5.95

Orders up to \$99.99 add \$7.95

Orders \$100 and up add \$9.95

Subtotal \_\_\_\_\_

\*\*Handling \_\_\_\_\_

TOTAL \_\_\_\_\_

Method of Payment:

\_\_\_\_\_ Check enclosed payable to ABA

\_\_\_\_\_ Visa \_\_\_\_\_ Mastercard \_\_\_\_\_ American Express \_\_\_\_\_ Bill Me

Card Number \_\_\_\_\_

Expiration Date \_\_\_\_\_

Signature \_\_\_\_\_

*Please print or type. The preferred method of shipping is UPS, which requires street address.*

*If you list a P.O. Box we will ship by U.S. Mail.*

Name \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Telephone \_\_\_\_\_

*Need rush delivery? Call 800-285-2221 and ask our Service Center Representatives about options for overnight delivery.*

**Mail to:** Publication Orders, ABA,  
P.O. Box 10892, Chicago, IL 60610-0892

**Call:** 800-285-2221

The method of ordering these pamphlets may change, as may their titles and prices.

## **The State Bar of California Estate Planning Brochures**

The three pamphlets you want to order from the California State Bar are: Do I Need A Will? Do I Need Estate Planning? and Do I Need a Living Trust? The cost of the pamphlet is 50 cents for up to 99 of them, or 100 for \$40.00. Go to <http://www.calbar.ca.gov/Public/Pamphlets.aspx>

Under “Get the Legal Facts of Life” click on “Pamphlet Order Form.” This will allow you to order in quantity three helpful pamphlets on estate Planning: *Do I Need a Will?*, *Do I Need A Living Trust*, and *Do I Need Estate Plannning?*

The method of ordering these pamphlets may change, as may their titles and prices.