



Cape Fear
Habitat
for Humanity



My Legacy

A Workbook And Plan To Protect Your Family And Your Assets



Make Your Wishes Known and Understood

Preparing your Will is an important matter because it directs the control of your estate after your death. It does not give up any of your rights to the property while you are alive.

This is a love letter to family and to the organizations that you love. As you begin this process it's good to know that the end result will be a plan for the protection of your family and the distribution of your assets according to your wishes. It is equally important to be able to express the important values of your life through your Will. You do that by distributing your assets in ways that provide ongoing support to the people and entities important to you.

*This is not legal advice. This is a tool to help prepare you for conversations with your financial advisor and attorney. Please refer to them for customized advice that meets your specific needs.



What is a Will?

A Will is your way, in writing, of directing how your assets are to be distributed after your death.

Your accumulated assets can include:

- Your home
- Personal belongings
- Investments
- Stock options
- Other compensation

You can also use your Will to:

- Name guardians for your minor children
- Choose a personal representative to execute your wishes in the Will
- Name an individual, bank or trust to manage and invest your estate
- Create trusts for the ongoing support of your spouse, children or other people or organizations important to you
- Avoid misunderstandings among your heirs about your wishes
- Direct specific assets to particular people.

Making Your Will Can Be a Simple Process

Think about what you want to accomplish.

Talk to your family and trusted advisors about your wishes for yourself and your loved ones.

Complete this Will Workbook and take it to your attorney. This will make the process much easier and should save you money by being prepared.

Keep your completed Will in a secure place.

- Review your Will every three to five years or when key circumstances in your life change.
- Remember this Workbook is designed as a Will planning resource; it is not a legal document. Rather it is an excellent tool to take to your attorney to expedite the process of making your legal Will.



family record

The First Step Is To Create A Family Record

Family Record

Date _____

First Name _____

Middle _____

Last _____

Are You Married? Yes No

If Yes, Name Of Spouse

First Name _____

Middle _____

Last _____

Your Permanent Address

Street _____

City _____ State _____ Zip _____

Do You Have Another Home? ☐ Yes ☐ No

Street _____

City _____ State _____ Zip _____

Birth Dates

Yours

Month _____ Day _____ Year _____

Spouse

Month _____ Day _____ Year _____

Social Security Numbers

Your Social Security Number _____

Your Spouse's Social Security Number _____

relatives

Who Are Your Nearest Relatives?

List Them In This Order:

1. Children
2. Grandchildren
3. Brothers And Sisters
4. Parents

Name And Relationship _____

Address _____

Name And Relationship _____

Address _____

Name And Relationship _____

Address _____

Name And Relationship _____

Address _____

Name And Relationship _____

Address _____

Name And Relationship _____

Address _____

Name And Relationship _____

Address _____

Name And Relationship _____

Address _____

Name And Relationship _____

Address _____

(List additional names on a separate sheet of paper and attach to this page.)



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Distributing Your Estate

You don't need to describe every item of personal or real property in your Will. If there are specific items or property you want to go to certain individuals or charities, you should list them here. Also, if you want to leave a specific sum of money to a person or charity, state the specific name of person or charity and the amount you wish to leave.

Specific Bequests

Person Or Charity	Address	Item, Property Or Amount Of Money

Now that you've decided on specific bequests, the easiest way to divide the rest of your estate is by percentages. Just name the persons, ministries or organizations you wish to remember. Then state the percentage of the total remaining amount of your estate you wish each of them to receive.

Person Or Charity	Percentage

This statement can be used to designate your gift:

"I give and bequeath the sum of \$ _____ (or ____%)
(or 'the rest, remainder and residue') of my estate to:

Name _____

Address _____

Purpose _____

If you have the tax ID of the organization that you wish to give to, it helps to identify them

personal representatives and guardians

Choosing A Personal Representative And Guardian: Keep Control, Name A Personal Representative

A personal representative is appointed by you to carry out the terms of your Will. If you don't name a personal representative in your Will, the court will appoint an administrator. It is a good idea to also name an alternate personal representative.

Name of personal representative _____

Address _____

Name of alternate personal representative _____

Address _____

Protect Your Children, Name Their Guardian

If you have minor children you should name a guardian for them in your Will. This person may have the responsibility for both your children and your property, or you may select a guardian to care only for the children and a separate guardian or trustee for the property.

Name of guardians _____

Address _____

Name of guardian (or trustee) for the estate _____

Address _____

An Inventory Of My Estate

Date _____

A. Personal Property

Please list personal effects, automobiles, jewelry, household furniture, heirlooms, etc.

Item	Approximate Value If Sold Today

B. Cash In Checking And Savings

This list should include the name and address of your bank, Certificates of Deposit, Mutual Funds, IRA's, KeoghPlans and Money Market Funds.

	How Owned*	Amount
*SINGLE, JOINT, OTHER	TOTAL	\$

C. Stocks, Bonds And Other Similar Investments

Number	Company	How Owned*	Amount
*SINGLE, JOINT, OTHER	TOTAL	\$	

(LIST ADDITIONAL ITEMS ON A SEPARATE SHEET OF PAPER AND ATTACH TO THIS PAGE.)

An Inventory Of My Estate (Page 2)

D. Money Invested In Mortgages, Personal Loans, Limited Partnerships, Royalties, Etc.

Item	With Whom And Address	Amount
TOTAL		\$

E. Real Property (Real Estate, Farmland And Buildings)

Property Type	Address	How Owned*	Value
*SINGLE, JOINT, OTHER			TOTAL \$

F. Insurance

If the beneficiary of your life insurance policy should precede you in death, the insurance would be payable to your estate, at face value, less any loans or charitable distribution you have designated on the beneficiary form of your policy, and therefore should be covered by your Will.

Company	Address	Beneficiary	Value
NET FACE VALUE OF LIFE INSURANCE			\$

Total approximate value of all assets (Add a, b, c, d, e, f):

\$ _____

(List additional items on a separate sheet of paper and attach to this page.)

An Inventory Of My Estate (Page 3)

G. What I Owe

Debts And Mortgages Against Your Estate

DEBT/MORTGAGE (TO WHOM?)	ADDRESS	VALUE
TOTAL		\$

H. Total Approximate Estate Value

TOTAL FROM CHARTS	VALUE
CHART A TOTAL	\$
CHART B TOTAL	+\$
CHART C TOTAL	+\$
CHART D TOTAL	+\$
CHART E TOTAL	+\$
CHART F TOTAL	+\$
TOTAL OF ASSETS	\$
MINUS CHART G TOTAL	-\$
TOTAL	\$

your wishes

Make Sure Your Survivors Know Your Wishes

This section is a chance for you to fill in the details of your burial and other information that may be essential for survivors to know.

From: _____

Date: _____

1. Name of church and pastor _____

2. Do you wish to be buried? yes no

If no, do you wish to be cremated? yes no

If yes, how do you want your ashes disposed of? _____

If no, how do you want your body cared for? _____

3. Preference of undertaker _____

4. Funeral instructions (type of service, location of burial plot) _____

5. In my memory, contributions may be made to: (list church or charity) _____

6. Please call the following individuals

Name _____ Area Code and Phone _____

7. Name and address of my personal representative(s) _____

8. Your will

Note: it's important for your survivors to be able to locate vital records and important documents. You should have a Will to minimize the taxes your estate will have to pay and ensure who will receive your assets.

A. My will is located _____

B. My will was last updated _____

(Because of a birth, death, marriage, divorce, move to another state, change in tax laws)

C. My attorney _____

9. Location of important documents

A. Birth certificate _____

B. Marriage certificate _____

C. Children's birth certificates _____

D. Divorce decree _____



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your wishes (cont)

Your Wishes (page 2)

10. My social security number is _____

Are you receiving any special social security benefits? yes no

If yes, please list the benefits _____

11. Are you receiving veterans benefits? yes no

VA claim number _____

Location of discharge document _____

12. Pension plans

A. Where _____

B. Type _____

C. Address _____

13. Life insurance policies

	COMPANY	POLICY #	OWNER	AMOUNT	LOCATION
--	---------	----------	-------	--------	----------

A. _____

B. _____

C. _____

D. _____

E. _____

14. Automobile insurance

Company _____ phone number _____

Address of company _____

15. Personal property insurance

Company _____ phone number _____

Address of company _____

16. Real estate

A. List all property owned

Property _____ Mortgagor _____

B. Deeds are located: _____

C. Insurance on above property is with:

Company _____ Address _____

Policy located _____

D. Location of mortgages, closing statements, title abstracts, title insurance policies and tax receipts _____

your wishes (cont)

Your Wishes (page 3)

17. Bank accounts

- A. Checking _____
Checking _____
- B. Savings _____
Savings _____
- C. Certificate of deposit _____
Certificate of deposit _____
- D. Safe deposit box _____
Key location: _____

18. Government bonds (list or attach a list)

19. Securities (list or attach a list)

Name and address of broker _____

Where stock certificates are located _____

20. Individual retirement accounts

21. Business assets

22. Location of income tax records

You Have Completed Your Will Workbook!

Now that you have completed your Will Workbook, visit your attorney and have your Will prepared.

When you do your Will, you have accomplished many important things:

- Named your personal representative to represent your Will
- Named a guardian for your children, if necessary
- Considered possible obligations and favors for others
- Created a trust and chosen a bank or trustees to manage your estate
- Considered the final arrangements for your personal affairs
- Considered providing charitable gifts to non profit organizations of your choice, such Cape Fear Habitat For Humanity
- Make sure there is a home for your pets



capefearhabitat.org/legacy-gifts/



What Your Legacy Gift To Cape Fear Habitat Could Do....

Build A Home For A Deserving Family



"The program prepares you and gives you so much to look forward to. It's such a wonderful feeling to know we can buy our own home....Our goal is to sustain, protect, and have everything in order to pass over to the next generation."

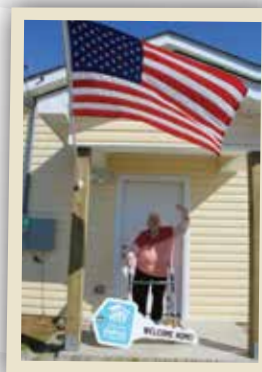
Deltina, Homeowner

"As a young girl I always dreamed of having a family, in my own home, and giving a life for my children in ways I never experienced myself. Habitat has granted me this beautiful opportunity to fulfill my lifelong dream."

*Stephanie,
Future Homeowner*



Make Repairs For A Veteran Or A Senior Citizen Allowing Them To Age In Their Own Home...



"Mary and I created our will to make sure our grand kids and great grand kids had resources that we didn't. We also wanted to make sure that organizations like Cape Fear Habitat for Humanity were a part of our legacy because we feel that every gift makes a difference, and we have seen the impact of our yearly giving locally." - Jim, Cape Fear Habitat Donor



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Rich Duncan MBA, CFRE
Director of Development
Phone: 910-762-4744 ext. 106
Email: rich@capefearhabitat.org

3310 Fredrickson Road,
Wilmington, NC, 28401



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