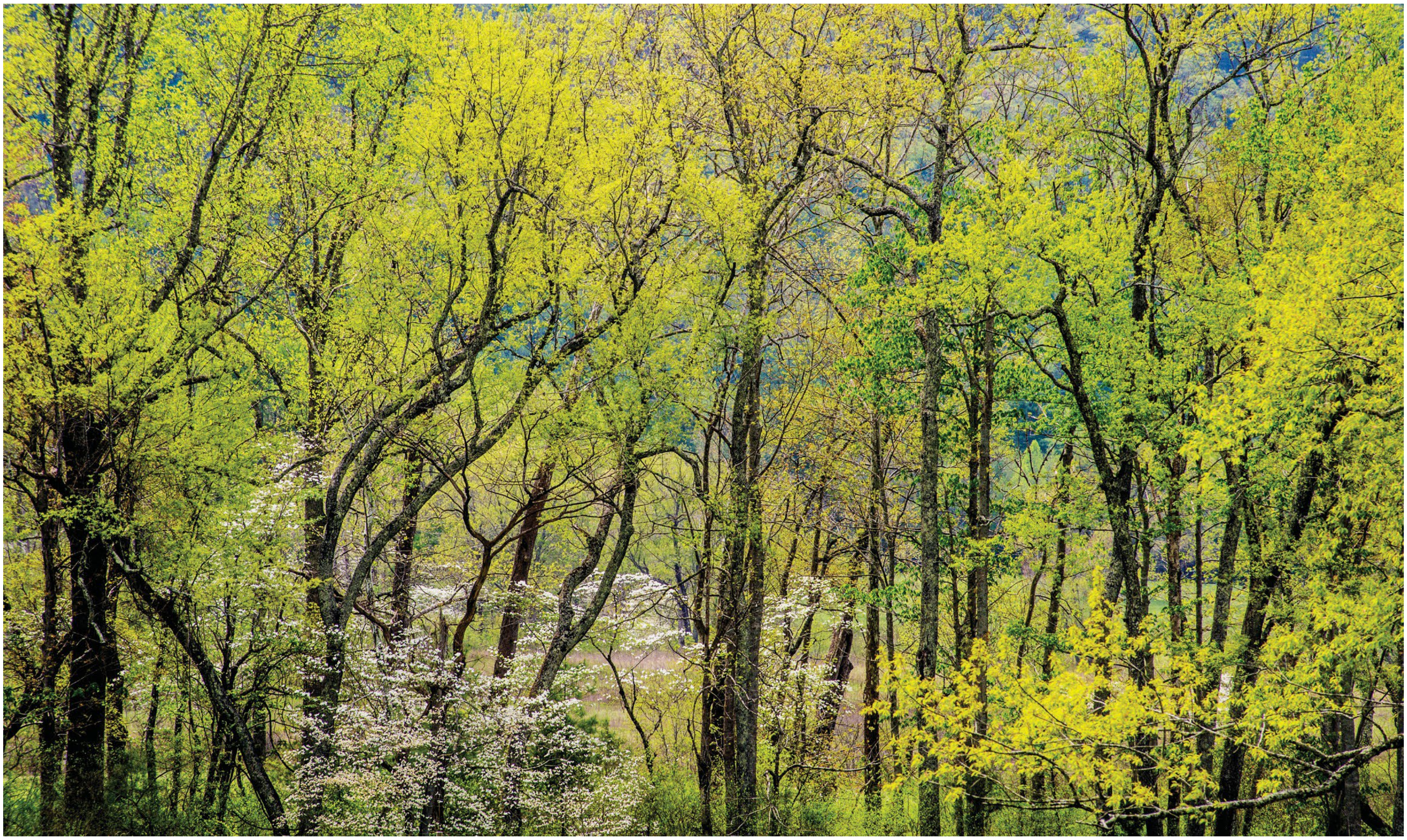

# My Legacy: A Planning Workbook

## WHERE TO START

For many of us, the task of creating or updating our estate plan is one of those "to-do's" we repeatedly move to the bottom of the list. It's easy to ignore estate planning— but you owe it to yourself and your family to be prepared for the inevitable. And think of the priceless peace of mind you will feel knowing that your plans are in place, your loved ones will be cared for, and your values will live on beyond your lifetime! This workbook will help you locate and organize the important documents you need in order to create or update your estate plan, giving you peace of mind and assuring your wishes are documented and your legacy is honored.

American Forests™

1220 L STREET, NW | SUITE 750 | WASHINGTON, DC | 20005 | 202.737.1944 | www.americanforests.org

## These Four Questions Will Help You Get Started:

1. **What do I own?** Before you can decide how to distribute your assets, you need a clear sense of what you own. Use the following inventory worksheet to help you create a list of your assets.
2. **What do I want to pass on?** An estate plan not only helps you consider how and to whom you want to pass on your material assets, it is also an expression of what values you want to live on beyond your lifetime. You can ensure your values carry on by including in your estate plan the causes and organizations you believe are important and support during your life.
3. **Whom do I trust to carry out my wishes?** Identify a small circle of trusted people you can designate to carry out your wishes.
4. **How can I best accomplish my goals?** A qualified estate planning attorney can help you structure your plan to avoid problems, save money and taxes, protect loved ones and fulfill your wishes for a lasting legacy.

### Consider Your Personal and Financial Goals

- Provide for a spouse
- Support children who are under 18
- Provide for a family member with special needs
- Avoid probate
- Pass on a business or home to a family member
- Leave personal mementos to family or friends
- Minimize taxes and expenses associated with the distribution of assets
- Leave a gift to charity

## YOUR GOALS

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________

# PLANNING WORKSHEETS

## Personal Information

| My Name: | | |
|---|---|---|
| Address: | | |
| City: | State: | Zip: |
| Home Phone: | Cell Phone: | Email: |
| Birth Place: | Birth Date: | SSN: |

| Spouse's Name: | | |
|---|---|---|
| Address: | | |
| City: | State: | Zip: |
| Home Phone: | Cell Phone: | Email: |
| Birth Place: | Birth Date: | SSN: |

| Child's Name: | | |
|---|---|---|
| Address: | | |
| City: | State: | Zip: |
| Home Phone: | Cell Phone: | Email: |
| Birth Place: | Birth Date: | SSN: |

| Child's Name: | | |
|---|---|---|
| Address: | | |
| City: | State: | Zip: |
| Home Phone: | Cell Phone: | Email: |
| Birth Place: | Birth Date: | SSN: |

| My Parents: | | |
|---|---|---|
| Address: | | |
| City: | State: | Zip: |
| Home Phone: | Cell Phone: | Email: |

| Other Family: | | |
|---|---|---|
| Address: | | |
| City: | State: | Zip: |
| Home Phone: | Cell Phone: | Email: |

| Friend's Name: | | |
|---|---|---|
| Address: | | |
| City: | State: | Zip: |
| Home Phone: | Cell Phone: | Email: |

## My Advisors and Representatives

| | | |
|---|---|---|
| Accountant: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Estate Planning Attorney: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Financial Advisor: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Insurance Agent/Company: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Retirement Plan Administrator: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Financial Power of Attorney: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Medical Power of Attorney: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Executor of Estate: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Trustee: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Guardian of Property: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Guardian Over My Children: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Guardian of Pet(s): | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

| | | |
|---|---|---|
| Other: | | |
| Address: | | |
| City: | State: | Zip: |
| Phone: | | Email: |

## Location of Important Documents and Possessions

| Description | Location/Address | Number/Unit | Combination, Location of Key or Access Code |
|---|---|---|---|
| Safe Deposit Box | | | |
| Storage Locker | | | |
| Home Safe/Lock Box | | | |
| Other | | | |
| Other | | | |
| Other | | | |

## Financial Accounts & Assets

| **Account Type** | **Account Number** | **Institution Name and Address** | **In the Name of** |
|---|---|---|---|
| Checking Account | | | |
| Savings Account | | | |
| Retirement Account | | | |
| Stocks, Bonds, Mutual Funds | | | |
| Annuities | | | |
| Life Insurance Policy | | | |
| Other: | | | |
| Other: | | | |

## Digital Accounts

| **Device/Website** | **User ID** | **Password** |
|---|---|---|
| Home Computer | | |
| Cell Phone | | |
| Email | | |
| Tablet | | |
| E-reader | | |
| Facebook | | |
| Twitter | | |
| LinkedIn | | |
| Other | | |
| Other | | |
| Other | | |

## Liabilities

| **Mortgage Holder** |
|---|
| Company: |
| Account Number: |
| Contact: |
| Phone: |
| Email: |

| **Student Loans** |
|---|
| Company: |
| Account Number: |
| Contact: |
| Phone: |
| Email: |

| **Car Loan** |
|---|
| Company: |
| Account Number: |
| Contact: |
| Phone: |
| Email: |

| **2nd Mortgage Holder** |
|---|
| Company: |
| Account Number: |
| Contact: |
| Phone: |
| Email: |

| Equity Line of Credit |
| --- |
| Company: |
| Account Number: |
| Contact: |
| Phone: |
| Email: |

| Credit Card |
| --- |
| Company: |
| Account Number: |
| Contact: |
| Phone: |
| Email: |

| Credit Card |
| --- |
| Company: |
| Account Number: |
| Contact: |
| Phone: |
| Email: |

| Other |
| --- |
| Company: |
| Account Number: |
| Contact: |
| Phone: |
| Email: |

| Credit Card |
| --- |
| Company: |
| Account Number: |
| Contact: |
| Phone: |
| Email: |

| Other |
| --- |
| Company: |
| Account Number: |
| Contact: |
| Phone: |
| Email: |

## Insurance Policies

| **Life Insurance** | | | | |
| --- | --- | --- | --- | --- |
| Type/Issuer | Owner | Beneficiary | Contingent Beneficiary | Contact Information |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| **Health Insurance** | | |
| --- | --- | --- |
| Company | Contact Information | Policy # |
| | | |
| | | |

| **Disability Insurance** | | |
| --- | --- | --- |
| Company | Contact Information | Policy # |
| | | |
| | | |

| Other Insurance Policies | | |
|---|---|---|
| Type | Company | Contact Information |
| Auto | | |
| Umbrella | | |
| Home/Renter | | |
| Other | | |

## Meaningful Belongings & Items of Sentimental Value

| **Item Description** | **Location** | **Why it's special to you** | **Who do I want to have this** |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

## My Beneficiaries

Use this section to note how you would like your assets distributed after your lifetime. This is a good opportunity to provide for your loved ones and create a lasting legacy for future generations. Many people choose to include a charitable gift to causes that have been meaningful during their lifetime, such as American Forests.

| Charitable Beneficiaries | | |
|---|---|---|
| Organization Name | Type of Gift | Organization Contact |
| (e.g. American Forests) | | |
| | | |
| | | |
| | | |
| | | |

| Other Beneficiaries | | |
|---|---|---|
| Name and relationship | Type of Gift | Organization Contact |
| | | |
| | | |
| | | |
| | | |
| | | |

## Planning Your Legacy

Many people like to create their enduring legacy by leaving gifts to loved ones and to charity in their will or trust or by beneficiary designation. If you are considering leaving a gift to American Forests, please use the following information:

**"I give to American Forests, (EIN 53-0196544), a nonprofit corporation currently located at 1220 L Street, NW, Suite 750, Washington, DC 20005, or its successor thereto,_______________[written amount or percentage of the estate] for its unrestricted use and purpose."**

**Legal Name:** American Forests
**Tax ID Number:** 53-0196544
**Address:** 1220 L Street, NW, Suite 750, Washington, DC 20005

## AT YOUR SERVICE

For more information or assistance in crafting your personal legacy, or to notify us that you have included a gift for American Forests in your estate plan, please contact:

**Sarah Mitchell**
**Senior Director, Individual Philanthropy**
202.737.1948
smitchell@americanforests.org

If you choose to include a gift for American Forests, please let us know! We would love to recognize your generosity by welcoming you as a new member of our Evergreen Society, which offers special benefits for those who include American Forests in their estate plans. Telling us of your plans in advance is also the best way to ensure that your wishes are carried out as you intended.