

# Estate Planning Record

## A. INFORMATION

1. **Estate Planning Folder**
  - a. Received Originals
  - b. Information Sheet
  - c. Attorney Representation Notice
  - d. TAC Disclosure Statement of Objectives
  - e. Donor Disclosure
2. **Biblical Counsel**
  - a. Dave Ramsey's Three Bible Verses That Will Help You Leave a Legacy
  - b. Gio Marin's Messages on Finances from the Spirit of Prophecy
  - c. Counsels on Stewardship by Ellen G. White, Chapter 62, Preparation for Death
  - d. Acts of the Apostles by Ellen G. White, Chapter 3, The Great Commission
  - e. Gift Planning Possibilities
3. **Will and Trusts**
  - a. Holographic Will: A Handwritten Will
  - b. Estate Planning Terms
  - c. Know the Difference Between an Heir and a Beneficiary
  - d. Charitable Bequest
  - e. Letter of Instruction and Suggestion
  - f. Where Should I Keep My Last Will?
  - g. Checklist for Updating Your Will and Estate Plan
  - h. Who Will Receive Your Property?
  - i. Seven Ways of Giving Your Possessions
4. **Ancillary Documents**
  - a. Advance Directives
  - b. Is DNR the Same As A Living Will In Texas?
  - c. What is the Difference Between a Living Will and An Advance Directive?
5. **Beneficiary Designations**
  - a. Term Life Insurance by Dave Ramsey, Don't Leave Your Family Unprotected
  - b. 10 Tips for Choosing A Life Insurance Beneficiary
  - c. Naming A Beneficiary: What You Need to Know
6. **Other**
  - a. What is a Charitable Gift Annuity
  - b. Family Emergency Preparedness
  - c. Your Gift, Your Legacy
  - d. My Family Tree
  - e. TCA Gift Acceptance Policy and Guidelines
  - f. Benjamin Franklin's Last Will & Testament\*
  - g. Ellen White's Last Will & Testament\*
- j. Estate Planning Fiduciary Roles
- k. What is an Executor's Responsibility?
- l. 10 Stressors to Avoid When Administering a Deceased Estate
- m. Will vs Trust
- n. Distinguishing CRATS from CRUTs

## B. Document PREPARATION

- A. Will
- B. Codicil
- C. Advance Directive
- D. Medical Power of Attorney
- E. Financial Power of Attorney
- F. Gift Annuity
- Trust
- G. Self-managed Trust
- H. Conference-managed Trust
- I. Trust Amendment
- J. Pour-over Will
- K. Enhanced Life Estate Deed

