Estate Planning Workbook

A guide for organizing your personal records

Mission: Dignity.
Assisting Retired Ministers and Spouses

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A brief look at estate planning issues

If you don’t have a large estate or if you plan on leaving everything to your spouse or children, you may think estate planning is not necessary. However, a comprehensive estate plan may help you avoid probate or save time and estate taxes regardless of the size of your estate.

But estate planning is more than tax avoidance. It is the process of exercising prudent stewardship throughout your life and beyond. Without it, the material resources God has enabled you to accumulate over the years may not end up where you thought they would after you are gone.

Proverbs 31:8 begins with these words: Speak up for those who cannot speak for themselves (NIV). Perhaps this is the easiest way to summarize what an estate plan can do for you: A prayerfully developed estate plan can help you prepare for the time when you cannot speak for yourself — at the point of your death or because of disability or incapacitation.

When you die, someone will have to distribute your assets, care for surviving minor or disabled children, and make funeral and burial arrangements. If you become disabled, you may need someone to make sure your bills are paid, file your tax returns, and handle other legal and financial affairs.

If you do not have a plan in place, someone else will speak for you. It may be a friend, relative or other trusted acquaintance. Or, it may be the government. Can you be sure they will adequately and appropriately carry out your wishes? Will their decisions honor God in the way you would want?

By thinking through these and other issues today, you can begin to prepare for the long-term distribution of your property to family, friends and charitable interests.

What do I want to accomplish?

Before you create a will or an estate plan, you’ll need to determine what you want your estate plan to do. It is not a “one size fits all” process. This book is designed to help clarify your goals and organize your information so you will be better prepared to choose the proper estate planning tools.

How do I want my property distributed?

No matter how rich or poor you are, everything you own will be distributed to others when you die. With proper planning, you can be sure it’s given to the people you choose. The initial step in the planning process is to take inventory of what you have, and then decide where you want it to go.

Do I need a will?

It’s one thing to know how you want your property distributed; it’s another to have the tools in place to make it happen. The most basic instrument in your estate plan is a valid will. More than two-thirds of the American population die without a will.

The decision to make a will is an important step in ensuring those you love will get the maximum value from your estate. While there are no laws that require you to make a will, there are laws to dictate what happens to your estate if you don’t.

Fortunately, you don’t have to rely on your state’s laws to make decisions for you. When you prepare a will, you can decide who will receive your property. Steps can also be taken to reduce expenses and speed up the process of distributing your property.
How can I reduce probate time, probate costs and estate taxes?

Probate is the legal process of carrying out the instructions of a will. Depending on how much you own, you may want to reduce estate taxes and probate issues. Probate proceedings become a matter of public record and also add to the costs of settling your estate.

Taxes are typically not an issue unless you expect the value of your personal estate to exceed the federal tax exemption amount. However, if you desire to maintain confidentiality and keep certain aspects of your will out of the public record, a trust and other planning devices may be useful. Proper titling of assets is also an important step in transferring your estate.

Do I need to set up a trust?

Maybe. Depending on the amount and type of assets you have, and the way you want to transfer or shelter your assets, a trust may be a sound part of your planning process.

The basic idea of a trust involves the transfer of ownership of an asset to a trustee who will manage it. The trustee is then responsible for managing the asset in accordance with the instructions in the trust document.

Trusts can be funded with cash, stocks and bonds, real estate or other assets and offer a variety of benefits. A trust can provide income for life, valuable tax savings and the security of professional financial management with the ability to provide for a cause that is special to you. You may also avoid probate for assets in a trust.

There are several different types of trusts and a qualified financial or legal advisor can help you determine which may work best for you.

What is a Revocable Living Trust?

If your estate is complicated, you should consider a Revocable Living Trust as an addition to a will. With a living trust, you can transfer property to the trust while you are alive, but maintain control of your assets by naming yourself the trustee. When you die, your co-trustee or chosen successor would then manage the property and disburse your assets according to the specifications you lay out in the trust agreement.

Because it is revocable, you may change or terminate the trust at any time with certain conditions.

With a living trust, you keep clear of the costs, hassles and publicity of probate. One drawback is you must retile any assets you want to put into a living trust, such as a house, in the name of the trust.

You should also consider the expense of setting up a Revocable Living Trust. The setup costs may not significantly offset any savings in probate fees and expenses.

What is a Credit Shelter Trust?

This is an especially useful device for couples with large estates. Under current tax law, individuals can transfer unlimited amounts to a surviving spouse without any estate tax considerations. However, this may not totally avoid estate taxes on large amounts — it will simply delay the taxes until the surviving spouse’s death.

By transferring all of your assets to your spouse, you don’t take advantage of your personal unified tax credit or estate tax exemption. When your spouse dies, you can use his or her credit to avoid taxes on a portion of the remaining estate. However, you’ve lost the combined value of using the individual exemptions.

With a Credit Shelter Trust (also called a Bypass Trust, AB Trust or Family Trust), you pass, in your will, an amount equal to the estate tax exemption to the trust, and pass the rest of your estate to your spouse. You can also specify how you want the trust to be used. For example, you can stipulate that income from the trust goes to your spouse and when he or
she dies, the principal will be distributed among your children.

Since the remaining spouse can leave an additional amount, up to the current estate tax exemption amount, tax-free to your heirs, you and your spouse can effectively double the amount of your estate that is shielded from taxes by using this strategy.

Can I use a trust to give to a charity?

There are several trusts which may be useful for taking care of your needs while also allowing you to help others through a donation to a good cause. Two of the most common types are a Charitable Remainder Unitrust and a Charitable Remainder Annuity Trust.

A Charitable Remainder Unitrust offers real value if you are concerned about the effects of inflation on your retirement income. With this type of trust, you retain variable income for your lifetime or a fixed term of years, claim a current income tax deduction and make a future gift to a charity of your choosing when the remainder of your trust reverts to the charity at the time of your death.

With a Charitable Remainder Annuity Trust, you irrevocably transfer money or stock to a charity. At the time you create the trust, you and the charity agree to a fixed rate of return. The charity then invests the assets and pays you an income for life. At the time of your death, the remainder of the trust reverts to the charity.

What is the difference between a unitrust and an annuity trust? The unitrust pays income based on a fixed percentage, but on a variable amount. So if the unitrust investments perform well, income may be increased. This also allows for long-term income growth. In addition, only a unitrust can be used when a gift of property is the asset used to fund the trust.

An annuity trust pays income based on a fixed percentage of a fixed amount. This means the donor will always know exactly what the income will be — the amount will never change. Because of this, donors who count on the security of a fixed income may like this kind of trust better.

If you have highly-appreciated assets such as common stock or property, utilization of a charitable trust can help you delay capital-gains taxes on the appreciation and put additional dollars to work. A portion of the income payments may be non-taxable to you or, at least, receive favorable tax treatment. You may also qualify for a current-year charitable deduction.

Who do I want to manage the distribution of my estate?

Any estate planning options require the appointment of an executor, administrator or trustee. This should be a person you trust who has a balance of personal skills, organizational ability and some financial knowledge.

This person will need to locate your will, handle the will through probate, collect and inventory your assets, pay debts against the estate, pay bills and taxes of the estate, prepare income tax returns for your final year and transfer property to beneficiaries.

Do I want to provide additional financial support for loved ones?

When creating your estate plan, you may discover you would like to provide more for your loved ones — especially if your home is not yet paid for or if you would like to provide funding for your children’s or grandchildren’s education.

Various insurance options allow you to provide additional financial support to your loved ones should your existing property not sufficiently cover your long-term goals. Life insurance is just one tool for adding to the value of your estate.

Through proper ownership of the life insurance policies, or through the use of a Life Insurance Trust,
your plan can be structured to keep the proceeds out of your taxable base and remain non-taxable for your beneficiaries.

**Who will care for my young or disabled children?**

If you have any children who are minors and/or disabled, someone will need to take care of them when you die. By planning ahead, you can be sure they are taken care of by someone you trust.

Think about the type of life you want your children to have and identify any people you know who can provide that for them. Be sure to consult with the person(s) you choose to name as guardian(s). Also, be sure to name an alternate in case the primary guardian dies before you do or chooses not to serve.

You can also set aside assets in a trust that will provide the resources necessary to meet their ongoing needs. Here are some additional questions to consider in your process:

- Who can provide the best physical and emotional care for my children?
- Who will be the best role model for my children?
- Who has the financial means to support my children?
- Who has values and morals that most closely match my own?
- Who is in sufficient health to provide adequate care?
- Who will most likely provide a stable, long-term home for my children?

**What would happen if I became incapacitated?**

Although we don’t like to think about it, at some point we may not be able to make decisions for ourselves. If that happens, someone will have to make financial and health decisions for us. *Aging with Dignity’s Five Wishes* booklet is included in the workbook to guide you in the process of choosing someone to make health care decisions for you in the event you become incapacitated.

**Do I have a Durable Power of Attorney?**

By signing a power of attorney, you can authorize another person to act on your behalf to perform any number of specified acts such as banking, real estate transactions, business operations and insurance and lawsuit management. There are two types of *Durable Powers of Attorney*:

1. An “immediate power of attorney,” which is not affected by your subsequent disability or incapacity, and,
2. A “springing power of attorney,” which does not go into effect until you become disabled or incapacitated. It is this type that is most commonly incorporated into an estate plan.

**Do I have a Health Care Power of Attorney?**

*Health Care Powers of Attorney* (also known as *Health Care Proxies*) recognize your right to appoint a health care agent you trust to decide about medical treatment in the event you become unable to decide personally.

Unless you specify otherwise, the agent will have the same authority you would to decide about treatment. The authority encompasses the right to forego treatment or to consent for needed treatment.

The agent’s authority begins only when a physician determines you have lost the capacity to decide about treatment.

**What about long-term care?**

Today, people are living longer. Given a choice, most would prefer to enjoy their freedom and independence in the comfort and security of their own homes. There are times, however, when circum-
stances require extended care either through home visitation by skilled medical personnel or a move to a long-term care facility.

When planning for the future, it may be advisable to include a discussion about the possibility of long-term care becoming a reality for you or your spouse. It does not need to create worry. Instead, use your discussion to help guide you in decisions about insurance, cash flow and Medicare issues.

**What do I want done for my funeral and burial?**

By clearly identifying your funeral and burial wishes, you can ease the strain and burden on your loved ones at what will already be a stressful time in their lives.

Although these instructions can be included in your will, it is better to write them out, if desired, in a separate document. Unless your will is easy to locate and all parties are aware of your instructions in the will, there may not be time to assure your wishes are fulfilled. It is also a good idea to discuss these matters with family ahead of time to provide a verbal, as well as a written, expression of your desires.

**What am I doing to give my estate away now?**

Do you really need to accumulate everything until you die? Are you taking advantage of the annual exclusion for gift-giving to others? Have you explored ways to utilize your resources for ministry and mission purposes now?

**Do I need to use an attorney?**

No, just like you don’t “have” to call a plumber to fix a leaky faucet or contact an electrician to install a light fixture. However, ask if you are really better off doing it yourself.

**Have I included charitable causes in my estate plan?**

Whether you have a little or a lot, you can multiply your influence for the future by taking advantage of some basic planning tools. Why do “just a little” for your church or other worthy ministries? Why not do something significant to further the cause of Christ and His kingdom?
Through the use of trusts, insurance and certain other planning tools, you can still give the total amount of your estate to your heirs over a period of time AND give to charity as well.

**Does my estate plan express sound Christian stewardship of God-given resources?**

This is really the most important question we can ask.

By stewardship, we mean properly providing for ourselves, our family and Kingdom causes now, in the future and after we are gone. It’s more than just placing something in the offering plate on Sunday. It’s leaving a legacy of gratitude to God and an example to our children and grandchildren. Deuteronomy 8:18 says, “But remember the Lord your God, for it is He who gives you the ability to produce wealth, and so confirms His covenant, which He swore to your forefathers, as it is today” (NIV).

The honoring of God through our stewardship is punctuated in 2 Corinthians 9:12–15: *This service that you perform is not only supplying the needs of the Lord’s people but is also overflowing in many expressions of thanks to God. Because of the service by which you have proved yourselves, others will praise God for the obedience that accompanies your confession of the gospel of Christ, and for your generosity in sharing with them and with everyone else. And in their prayers for you their hearts will go out to you, because of the surpassing grace God has given you. Thanks be to God for His indescribable gift!* (NIV).

**When should I begin my estate planning process?**

The sooner you get started, the sooner you are prepared to take care of your needs and the needs of your loved ones.

**How often should I review my estate planning documents?**

Any time you have a significant life event, you should take a look at your documents. This includes any time you move, change jobs, sell or buy a home, or experience a birth, death or marriage in your family. If your financial situation changes substantially or if you are considering changes to your administrators, successor trustees or beneficiaries, pull out your documents and review them. Even if you don’t have any major changes, you should go over your plans every three to four years just to make sure they say what you currently intend to say.

If you have a Revocable Living Trust, be sure to title your assets correctly in the name of the trust to avoid problems later.

Keep in mind that irrevocable documents generally cannot be changed after you execute them.
Summary of tools available to help you meet your estate planning goals.

Although wills are the most common estate planning tools, there are many others — each with a specific function — that help ensure your intentions are carried out the way you want. Some are more complex than others and each requires a different level of expertise. Also, because each tool serves a specific purpose, the ones that are right for you depend entirely on your specific estate planning needs.

**Wills** are used primarily to distribute property, although they also are used to appoint guardians for minor and/or disabled children. For a will, you assign an executor (the person who handles the administration) to lead your will through probate (the legal process for validating and implementing your will).

**Codicils** are amendments to existing wills. Sometimes it is easier — and less expensive — to write a minor change as a separate document than to rewrite your entire will.

**Trusts** are financial tools that help reduce estate taxes and control the assets distributed to your heirs, especially if you have children who are minors. For any trust, you must appoint a person to manage it. This person is called the trustee.

**Various insurance** options allow you to provide additional financial support to your loved ones should your existing property not sufficiently cover your long-term goals.

**Inter Vivos** gifts are gifts that you give while you are still alive. By reducing the size of your estate before you die, it will be easier to distribute assets later.

**When you assign someone with power of attorney,** you give them the right to make financial decisions on your behalf. These can be given at any time, but are typically designed to go into effect if you become incapacitated.

**Health Care Powers of Attorney** are like regular powers of attorney, except they give the person the right to make health care decisions for you, not financial decisions.

**Living Wills** are documents that clearly state your wishes for medical care in case of incapacitation. These generally include instructions as to what treatments to administer or withhold.

**Funeral directives** typically state your wishes so your family does not need to make those decisions for you during their period of mourning.
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GuideStone® was founded on the idea of serving those who gave sacrificially to spread the Word of God. Even though it has now become one of the largest denominational benefits organizations in the world — offering an array of retirement, life and health, and investment options — the heart of our work is still providing relief to aged ministers and their widows.

What we do

GuideStone’s Mission:Dignity program distributes financial assistance to almost 1,800 retired ministers and their widows. Qualified recipients of Mission:Dignity receive $225 per month for an individual or $300 per month for a couple. (Recipients must meet guidelines for income, assets and years of Southern Baptist service.) Often, this small monthly income makes the difference in paying the electric bill or getting needed medication.

More than $7 million is paid out annually in assistance to help retired servants of God pay for the basic necessities of life.

The majority of the funding comes from the direct gifts of individuals, groups and churches in our Southern Baptist family through the Mission:Dignity ministry.

Why you should be involved

John asked an important question in his first epistle, …whoever has this world’s goods, and sees his brother in need, and shuts up his heart from him, how does the love of God abide in him? (1 John 3:17 NKJV). The evidence of God’s love in our lives is in how we treat others — especially those in need.

Thousands of Southern Baptist ministers and their widows are living on small incomes, having reached retirement without the means to meet their living expenses. Many of these individuals sacrificed their own comforts as they answered God’s call and shared His Word with the lost. Now these godly men and women face critical financial circumstances in their retirement years. They struggle to pay for the basic needs of life — things like food, utilities, prescription drugs and medical care.
How you can help

You can share in this vital ministry through a variety of ways:

※ Personal gifts:
The Mission:Dignity ministry can receive a gift of any amount, and every dollar you share goes to help those in need with nothing taken out for administrative expenses. All gifts to the Mission:Dignity ministry are tax-deductible to the maximum amount allowed by law.

※ Planned giving:
You can name GuideStone as a beneficiary in your will, estate plan, charitable trust, IRA or retirement account. Here is a suggested way to word a bequest:

_I give, devise and bequeath _____ <indicate specific dollar amount OR specific percentage OR all the rest, residue and remainder of my estate> to the Retired Minister's Support Fund of GuideStone Financial Resources of the Southern Baptist Convention, 2401 Cedar Springs Road, Dallas, TX 75201-1498 for its corporate uses and purposes._

※ Spreading the word:
Get your church, Sunday school class or missions-oriented group involved. Many people are unaware of the plight of these retired ministers and widows. Encourage your church to make the Mission:Dignity ministry a part of their missions giving.

※ Prayer:
You can commit to praying on a regular basis for one of these godly men and women who has dedicated his or her life to God’s service. GuideStone coordinates prayer links between donors and recipients who give permission to share their names.

Join Southern Baptists across the nation in remembering the faithful ministers and their widows who dedicated their lives to the gospel ministry. God is calling you to recognize those who labor among you, and are over you in the Lord and admonish you, and to esteem them very highly in love for their work’s sake (1 Thess. 5:12–13a NKJV).

Find out more about this ministry and order free materials to share with your church or Sunday school class by visiting MissionDignity.org or calling 1-877-888-9409.

Mail gifts to:
Mission:Dignity
GuideStone
2401 Cedar Springs Road
Dallas, TX 75201-1498

For cash gifts of any amount, make checks payable to “GuideStone” and designate them for the Mission:Dignity ministry.
PERSONAL INFORMATION

My information
Name: _______________________________ Social Security number: ____________________
(Full legal name including maiden, if applicable)
Address: _____________________________ City: __________________ State: _________ ZIP Code: __________
Telephone: __________________________ Birth date: __________________ Birthplace: __________________
☐ Single
☐ Married (complete spouse information)
☐ Widowed (complete former spouse information)
☐ Divorced (complete former spouse information)

Spouse information
Name: _______________________________ Social Security number: ____________________
(Full legal name including maiden, if applicable)
Address: _____________________________ City: __________________ State: _________ ZIP Code: __________
Telephone: __________________________ Birth date: __________________ Birthplace: __________________
Marriage date: ________________________ Location: __________________

My former spouse information
Name: _______________________________ Birth date: _________________________________
(Full legal name including maiden, if applicable)
Marriage date: ________________________ Location: __________________
Reason: ☐ Death ☐ Divorce Date: ______________ Location: __________________
Name: _______________________________ Birth date: _________________________________
(Full legal name including maiden, if applicable)
Marriage date: ________________________ Location: __________________
Reason: ☐ Death ☐ Divorce Date: ______________ Location: __________________

Spouse's former spouse information
Name: _______________________________ Birth date: _________________________________
(Full legal name including maiden, if applicable)
Marriage date: ________________________ Location: __________________
Reason: ☐ Death ☐ Divorce Date: ______________ Location: __________________
Name: _______________________________ Birth date: _________________________________
(Full legal name including maiden, if applicable)
Marriage date: ________________________ Location: __________________
Reason: ☐ Death ☐ Divorce Date: ______________ Location: __________________
# MILITARY AND EMPLOYMENT BENEFITS

## My military service and employers

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## Spouse’s military service and employers

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*Complete information on these items in the Asset Inventory section.*
FAMILY HISTORY

My parents’ information
Father’s name: ____________________________ Birth date: ________________
   (Full legal name)
Birthplace: ____________________________ Date of death: ________________
Mother’s name: ____________________________ Birth date: ________________
   (Full legal name)
Birthplace: ____________________________ Date of death: ________________
Brothers and sisters
Name: ____________________________ Birth date: ________________ □ Brother □ Sister
Name: ____________________________ Birth date: ________________ □ Brother □ Sister
Name: ____________________________ Birth date: ________________ □ Brother □ Sister
Name: ____________________________ Birth date: ________________ □ Brother □ Sister
Name: ____________________________ Birth date: ________________ □ Brother □ Sister
Name: ____________________________ Birth date: ________________ □ Brother □ Sister

Spouse’s parents’ information
Father’s name: ____________________________ Birth date: ________________
   (Full legal name)
Birthplace: ____________________________ Date of death: ________________
Mother’s name: ____________________________ Birth date: ________________
   (Full legal name)
Birthplace: ____________________________ Date of death: ________________
Brothers and sisters
Name: ____________________________ Birth date: ________________ □ Brother □ Sister
Name: ____________________________ Birth date: ________________ □ Brother □ Sister
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## FAMILY HISTORY (continued)

**Children**

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Children of this marriage:

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Children of this marriage:

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<th>City</th>
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<th>ZIP Code</th>
<th>Spouse name</th>
<th>Marriage date</th>
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**FAMILY HISTORY (continued)**

### Children (continued)

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Spouse name: ___________________________  Marriage date: ___________________________

### Children of this marriage:

- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________

Spouse name: ___________________________  Marriage date: ___________________________

### Children of this marriage:

- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________

Spouse name: ___________________________  Marriage date: ___________________________

### Children of this marriage:

- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
- Name: ___________________________  Birth date: ___________________________
MY MEDICAL HISTORY

Physicians
Name: ________________________________ Telephone: ____________________________
Address: ____________________________ City: ___________ State: ________ ZIP Code: ________

Name: ________________________________ Telephone: ____________________________
Address: ____________________________ City: ___________ State: ________ ZIP Code: ________

Name: ________________________________ Telephone: ____________________________
Address: ____________________________ City: ___________ State: ________ ZIP Code: ________

Name: ________________________________ Telephone: ____________________________
Address: ____________________________ City: ___________ State: ________ ZIP Code: ________

Name: ________________________________ Telephone: ____________________________
Address: ____________________________ City: ___________ State: ________ ZIP Code: ________

Name: ________________________________ Telephone: ____________________________
Address: ____________________________ City: ___________ State: ________ ZIP Code: ________

Name: ________________________________ Telephone: ____________________________
Address: ____________________________ City: ___________ State: ________ ZIP Code: ________

Name: ________________________________ Telephone: ____________________________
Address: ____________________________ City: ___________ State: ________ ZIP Code: ________

ILLNESSES/SURGERIES/HOSPITALIZATIONS

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ILLNESSES/SURGERIES/HOSPITALIZATIONS (continued)

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Copy page as necessary.
SPouse Medical History

Physicians
Name: ___________________________ Telephone: ________________________________
Address: ________________________ City: ___________ State: _______ ZIP Code: ______
Name: ___________________________ Telephone: ________________________________
Address: ________________________ City: ___________ State: _______ ZIP Code: ______
Name: ___________________________ Telephone: ________________________________
Address: ________________________ City: ___________ State: _______ ZIP Code: ______
Name: ___________________________ Telephone: ________________________________
Address: ________________________ City: ___________ State: _______ ZIP Code: ______
Name: ___________________________ Telephone: ________________________________
Address: ________________________ City: ___________ State: _______ ZIP Code: ______
Name: ___________________________ Telephone: ________________________________
Address: ________________________ City: ___________ State: _______ ZIP Code: ______

Illnesses/Surgeries/Hospitalizations

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ILLNESSES/SURGERIES/HOSPITALIZATIONS (continued)

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Copy page as necessary.
# ASSET INVENTORY

## Bank accounts

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<th>Account number</th>
<th>Type</th>
<th>Balance</th>
<th>Name(s) held in</th>
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<td>Checking</td>
<td></td>
<td>Mine</td>
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<tr>
<td></td>
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<td>Savings</td>
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<td>Spouse</td>
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Bank accounts total: $________________________

(Transfer amount to page 33.)

## Certificates of deposit

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Certificates of deposit total: $________________________

(Transfer amount to page 33.)
## ASSET INVENTORY (continued)

### Securities (stocks, bonds, mutual funds, etc.)

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Name(s) held in: □ Mine □ Spouse □ Other: ________________________________

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Name(s) held in: □ Mine □ Spouse □ Other: ________________________________

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Name(s) held in: □ Mine □ Spouse □ Other: ________________________________

**Securities total: $_________**

(Transfer amount to page 33.)

### Individual retirement plans

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Name(s) held in: □ Mine □ Spouse □ Other: ________________________________

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Name(s) held in: □ Mine □ Spouse □ Other: ________________________________

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<th>Type</th>
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Name(s) held in: □ Mine □ Spouse □ Other: ________________________________

**Individual retirement plans total: $_________**

(Transfer amount to page 33.)
### ASSET INVENTORY (continued)

#### Employer-sponsored retirement plans

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<th>Value</th>
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<th>Beneficiary</th>
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<td>[ ] 403(b)</td>
<td>[ ] Other:</td>
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<tr>
<td>Account number:</td>
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<td>My Employer 2 retirement plan</td>
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<td>[ ] 403(b)</td>
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<td>[ ] 401(k)</td>
<td>[ ] 403(b)</td>
<td>[ ] Other:</td>
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<td>Spouse’s Employer 2 retirement plan</td>
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<td>[ ] 403(b)</td>
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**Employer-sponsored retirement plans total:** $________________________

(Transfer amount to page 33.)

#### Profit sharing

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<th>Plan Type</th>
<th>Value</th>
<th>Beneficiary</th>
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<td>Spouse’s Employer 1 profit sharing</td>
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<tr>
<td>Spouse’s Employer 2 profit sharing</td>
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</tbody>
</table>

**Profit sharing total:** $________________________

(Transfer amount to page 33.)
### Life insurance

**My military group life insurance**
- Policy number: 
- Face value: $
- Beneficiary: 
- Other: 

**My employer 1 life insurance**
- Policy number: 
- Cash value: $
- Face value: $
- Type: Term, Whole life, Universal, Variable, Group term
- Beneficiary: 
- Other: 

**My employer 2 life insurance**
- Policy number: 
- Cash value: $
- Face value: $
- Type: Term, Whole life, Universal, Variable, Group term
- Beneficiary: 
- Other: 

**Spouse’s military group life insurance**
- Policy number: 
- Face value: $
- Beneficiary: 
- Other: 

**Spouse’s employer 1 life insurance**
- Policy number: 
- Cash value: $
- Face value: $
- Type: Term, Whole life, Universal, Variable, Group term
- Beneficiary: 
- Other: 

**Spouse’s employer 2 life insurance**
- Policy number: 
- Cash value: $
- Face value: $
- Type: Term, Whole life, Universal, Variable, Group term
- Beneficiary: 
- Other: 

**Company:**
- Policy number: 
- Cash value: $
- Face value: $
- Type: Term, Whole life, Universal, Variable, Group term
- Name held in: Mine, Spouse, Other:
- Beneficiary: 
- Other: 

**Company:**
- Policy number: 
- Cash value: $
- Face value: $
- Type: Term, Whole life, Universal, Variable, Group term
- Name held in: Mine, Spouse, Other:
- Beneficiary: 
- Other: 

**Company:**
- Policy number: 
- Cash value: $
- Face value: $
- Type: Term, Whole life, Universal, Variable, Group term
- Name held in: Mine, Spouse, Other:
- Beneficiary: 
- Other: 

Insurance cash value total: $

(Transfer amount to page 33.)


**ASSET INVENTORY (continued)**

**Real estate holdings**

Address or survey name and abstract number: ________________________________
City: __________________ State: __________ County: _______________________
Purchase date: ______________ Cost: $ __________________ Approximate value: $ _______________
Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: ________________________________
Lien against property? ☐ Yes (Complete information on page 32.) ☐ No

Address or survey name and abstract number: ________________________________
City: __________________ State: __________ County: _______________________
Purchase date: ______________ Cost: $ __________________ Approximate value: $ _______________
Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: ________________________________
Lien against property? ☐ Yes (Complete information on page 32.) ☐ No

Address or survey name and abstract number: ________________________________
City: __________________ State: __________ County: _______________________
Purchase date: ______________ Cost: $ __________________ Approximate value: $ _______________
Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: ________________________________
Lien against property? ☐ Yes (Complete information on page 32.) ☐ No

**Real estate holdings total: $_________________________**
(Transfer amount to page 33.)

**Automobiles**

Make and model: ____________________________ VIN number: __________________
Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: ________________________________
Lien against automobile? ☐ Yes (Complete information on page 32.) ☐ No

Make and model: ____________________________ VIN number: __________________
Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: ________________________________
Lien against automobile? ☐ Yes (Complete information on page 32.) ☐ No

Make and model: ____________________________ VIN number: __________________
Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: ________________________________
Lien against automobile? ☐ Yes (Complete information on page 32.) ☐ No

Make and model: ____________________________ VIN number: __________________
Name(s) held in: ☐ Mine ☐ Spouse ☐ Other: ________________________________
Lien against automobile? ☐ Yes (Complete information on page 32.) ☐ No

**Automobiles total: $_________________________**
(Transfer amount to page 33.)
ASSET INVENTORY (continued)

Miscellaneous assets (jewelry, furniture, artwork, etc.)

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<th>Description</th>
<th>Location</th>
<th>Value: $</th>
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</tbody>
</table>

Miscellaneous assets total: $__________

(Transfer amount to page 33.)
ASSET INVENTORY (continued)

Business interests

Company: ___________________________ Telephone: ___________________________
Address: ___________________________ City: ___________ State: ___________ ZIP Code: ___________
Name held in: □ Mine □ Spouse □ Other: ___________________________
Form of ownership: □ Sole proprietorship □ Partnership □ Corporation
□ Other: ___________________________
Net value: $ ___________ Ownership interest: _________% Your value in business: $ ___________

Company: ___________________________ Telephone: ___________________________
Address: ___________________________ City: ___________ State: ___________ ZIP Code: ___________
Name held in: □ Mine □ Spouse □ Other: ___________________________
Form of ownership: □ Sole proprietorship □ Partnership □ Corporation
□ Other: ___________________________
Net value: $ ___________ Ownership interest: _________% Your value in business: $ ___________

Company: ___________________________ Telephone: ___________________________
Address: ___________________________ City: ___________ State: ___________ ZIP Code: ___________
Name held in: □ Mine □ Spouse □ Other: ___________________________
Form of ownership: □ Sole proprietorship □ Partnership □ Corporation
□ Other: ___________________________
Net value: $ ___________ Ownership interest: _________% Your value in business: $ ___________

Company: ___________________________ Telephone: ___________________________
Address: ___________________________ City: ___________ State: ___________ ZIP Code: ___________
Name held in: □ Mine □ Spouse □ Other: ___________________________
Form of ownership: □ Sole proprietorship □ Partnership □ Corporation
□ Other: ___________________________
Net value: $ ___________ Ownership interest: _________% Your value in business: $ ___________

Business interests total: $ ___________

(Transfer amount to page 33.)
LIABILITIES

Provide company or person's name and amount due for any outstanding mortgages, loans or debts.

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<tr>
<th>Name</th>
<th>Amount owed</th>
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</table>

Liabilities total: $__________________________

(Transfer amount to page 33.)
ESTATE SUMMARY

Bank accounts total $______________________________
Certificates of deposit total $______________________________
Securities total $______________________________
Individual retirement plans total $______________________________
Employer-sponsored retirement plans total $______________________________
Profit-sharing total $______________________________
Life insurance totals $______________________________
Real estate holdings total $______________________________
Automobiles total $______________________________
Miscellaneous assets total $______________________________
Business interests total $______________________________

Total assets: $______________________________
Less liabilities: $______________________________

NET ESTATE VALUE: $______________________________
### PROFESSIONAL DIRECTORY

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<tr>
<th>Name:</th>
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<tr>
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<td>Telephone:</td>
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*Indicate attorney, CPA, insurance agent, etc.*
**DOCUMENT INVENTORY**

Safe Deposit Box (SDB) number: ____________________________  Key location: ____________________________

Name(s) held in: ☐ Mine  ☐ Spouse  ☐ Other: ____________________________

Bank location: ____________________________

Home Fireproof Safe (FPS) location: ____________________________

Combination or key location: ____________________________

Important file location: ____________________________

Box location: ____________________________

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**NOTE:** Before storing important documents in a safe deposit box, verify your executor will have access to it at the time of your death. In some states, safe deposit boxes are sealed for a time upon the renter’s death.
WILL PLANNING CHECKLIST

Before meeting with your attorney to create a will, collect all of the details (including relevant paperwork) on the following items:

☐ Legal name, permanent address and birth date for all parties involved
☐ Date and place of marriages and divorces
☐ Pre- or post-marital agreements
☐ Current wills or codicils
☐ Living trust agreements (revocable or irrevocable)
☐ Names and addresses of children and other heirs
☐ Employment information
☐ Names and addresses of persons to be your executor, guardian or trustee
☐ Income tax returns for the last three years
☐ Gift tax returns
☐ Life insurance policies
☐ Information on retirement plans, profit sharing and deferred compensation plans
☐ Business agreements related to corporation, partnership and sole proprietorship interests
☐ Listing of all real estate including type of ownership, present fair market value and mortgages
☐ Listing of personal property including ownership, location and value
☐ Outline of objective and disposition of your estate
☐ Legal names and addresses for individuals and charitable organizations benefiting from your estate
MY ESTATE DISTRIBUTION

Personal representative
Executor or executrix: __________________________________________
Address: ___________________________ City: _________________ State: _______ ZIP Code: __________
Alternate executor or executrix: __________________________________________
Address: ___________________________ City: _________________ State: _______ ZIP Code: __________

Estate distribution
Do you wish to leave all of your estate to your spouse? □ Yes □ No (indicate other desire)

Specific bequests
Beneficiary name: ________________________ Birth date: ________ Relationship: ________________________
Address: ___________________________ City: _________________ State: _______ ZIP Code: __________
Bequest: □ Amount: $ ________________________ □ Percentage: _____% □ Remainder of estate
□ Specific item(s): ____________________________

Beneficiary name: ________________________ Birth date: ________ Relationship: ________________________
Address: ___________________________ City: _________________ State: _______ ZIP Code: __________
Bequest: □ Amount: $ ________________________ □ Percentage: _____% □ Remainder of estate
□ Specific item(s): ____________________________

Beneficiary name: ________________________ Birth date: ________ Relationship: ________________________
Address: ___________________________ City: _________________ State: _______ ZIP Code: __________
Bequest: □ Amount: $ ________________________ □ Percentage: _____% □ Remainder of estate
□ Specific item(s): ____________________________

Specific item(s): ____________________________

Beneficiary name: ________________________ Birth date: ________ Relationship: ________________________
Address: ___________________________ City: _________________ State: _______ ZIP Code: __________
Bequest: □ Amount: $ ________________________ □ Percentage: _____% □ Remainder of estate
□ Specific item(s): ____________________________

Specific item(s): ____________________________
### MY ESTATE DISTRIBUTION (continued)

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**NOTE:** If you designate a charitable organization as a beneficiary, it is generally a good idea to notify the organization in order to assist with their long-term planning.
SPOUSE ESTATE DISTRIBUTION

Personal representative

Executor or executrix: __________________________
Address: __________________________ City: __________ State: ________ ZIP Code: __________
Alternate executor or executrix: __________________________
Address: __________________________ City: __________ State: ________ ZIP Code: __________

Estate distribution

Do you wish to leave all of your estate to your spouse? ☐ Yes ☐ No (indicate other desire)

Specific bequests

Beneficiary name: __________________________ Birth date: ________ Relationship: __________________________
Address: __________________________ City: __________ State: ________ ZIP Code: __________
Bequest: ☐ Amount: $ __________________________ ☐ Percentage: ______% ☐ Remainder of estate
☐ Specific item(s):

Beneficiary name: __________________________ Birth date: ________ Relationship: __________________________
Address: __________________________ City: __________ State: ________ ZIP Code: __________
Bequest: ☐ Amount: $ __________________________ ☐ Percentage: ______% ☐ Remainder of estate
☐ Specific item(s):

Beneficiary name: __________________________ Birth date: ________ Relationship: __________________________
Address: __________________________ City: __________ State: ________ ZIP Code: __________
Bequest: ☐ Amount: $ __________________________ ☐ Percentage: ______% ☐ Remainder of estate
☐ Specific item(s):

Beneficiary name: __________________________ Birth date: ________ Relationship: __________________________
Address: __________________________ City: __________ State: ________ ZIP Code: __________
Bequest: ☐ Amount: $ __________________________ ☐ Percentage: ______% ☐ Remainder of estate
☐ Specific item(s): 
### Spouse Estate Distribution (continued)

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**NOTE:** If you designate a charitable organization as a beneficiary, it is generally a good idea to notify the organization in order to assist with their long-term planning.
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MY FINAL ARRANGEMENTS

See Document Inventory for pre-planned funeral information: □ Yes □ No

Organ donor: □ Yes □ No

Funeral home or church: _____________________________ Telephone: _____________________________
Address: _____________________________ City: ___________ State: _________ ZIP Code: ___________

Type of service: □ Christian □ Fraternal □ Military □ Memorial service with no casket present

Please cremate remains: □ No ashes to remain □ Instruction for ashes as follows:
________________________________________________________
________________________________________________________

Funeral instructions: □ Closed casket □ Open casket
________________________________________________________

Grave site information and location: _____________________________

Preferred ministers: _____________________________

Preferred soloist(s): _____________________________

Favorite hymns/songs:
1. _____________________________
2. _____________________________
3. _____________________________

Favorite Scripture passages/verses/poems/quotes:
1. _____________________________
2. _____________________________
3. _____________________________

Favorite flowers:
1. _____________________________
2. _____________________________
3. _____________________________

In lieu of flowers, please send donations to the following charity(ies):
1. _____________________________
2. _____________________________
3. _____________________________
MY FINAL ARRANGEMENTS (continued)

Preferred deliverer(s) of testimonials or eulogies:
1. 
2. 
3. 

Pallbearers:
1. 
2. 
3. 
4. 
5. 
6. 
7. 
8. 

Honorary pallbearers:
1. 
2. 
3. 
4. 
5. 
6. 
7. 
8. 

Please contact the following people to let them know of pending arrangements:

Name: __________________________ Telephone: _______________________
Address: _________________________ City: __________ State: _______ ZIP Code: ________

Name: __________________________ Telephone: _______________________
Address: _________________________ City: __________ State: _______ ZIP Code: ________

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MY FINAL ARRANGEMENTS (continued)

Name: ________________________________ Telephone: ________________________________
Address: ________________________________ City: ______________ State: _______ ZIP Code: ________________

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Address: ________________________________ City: ______________ State: _______ ZIP Code: ________________

Name: ________________________________ Telephone: ________________________________
Address: ________________________________ City: ______________ State: _______ ZIP Code: ________________

Copy page as necessary.
MY PERSONAL TESTIMONY

Read at my funeral:  ☐ Yes  ☐ No

When I became a Christian: Age:  Date:  

Church or location:  

Individual who led me to Christ:  

Baptized date:  Place:  

Testimony:  

Vital statistics and information for obituary:  

Memorial type and inscription:  


SPOUSE FINAL ARRANGEMENTS

See Document Inventory for pre-planned funeral information: □ Yes □ No

Organ donor: □ Yes □ No

Funeral home or church: __________________________ Telephone: __________________________

Address: __________________________ City: ___________ State: ___________ ZIP Code: ___________

Type of service: □ Christian □ Fraternal □ Military □ Memorial service with no casket present

Please cremate remains: □ No ashes to remain □ Instruction for ashes as follows:

Funeral instructions: □ Closed casket □ Open casket

Grave site information and location: __________________________

Preferred ministers: __________________________

Preferred soloist(s): __________________________

Favorite hymns/songs:
1. __________________________
2. __________________________
3. __________________________

Favorite Scripture passages/verses/poems/quotes:
1. __________________________
2. __________________________
3. __________________________

Favorite flowers:
1. __________________________
2. __________________________
3. __________________________

In lieu of flowers, please send donations to the following charity(ies):
1. __________________________
2. __________________________
3. __________________________
SPOUSE FINAL ARRANGEMENTS (continued)

Preferred deliverer(s) of testimonials or eulogies:
1. ___________________________________________________________
2. ___________________________________________________________
3. ___________________________________________________________

Pallbearers:
1. ___________________________________________________________
2. ___________________________________________________________
3. ___________________________________________________________
4. ___________________________________________________________
5. ___________________________________________________________
6. ___________________________________________________________
7. ___________________________________________________________
8. ___________________________________________________________

Honorary pallbearers:
1. ___________________________________________________________
2. ___________________________________________________________
3. ___________________________________________________________
4. ___________________________________________________________

Please contact the following people to let them know of pending arrangements:
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Address: __________________________ City: ____________ State: ________ ZIP Code: __________

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SPOUSE FINAL ARRANGEMENTS (continued)

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Address: ____________________________  City: ____________________________  State: ________  ZIP Code: __________

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Name: ____________________________  Telephone: ____________________________
Address: ____________________________  City: ____________________________  State: ________  ZIP Code: __________

Copy page as necessary.
SPOUSE PERSONAL TESTIMONY

Read at my funeral: □ Yes □ No

When I became a Christian: Age: ___________ Date: ____________________________

Church or location: ___________________________________________________________

Individual who led me to Christ: ______________________________________________

Baptized date: ________________ Place: _________________________________________

Testimony: __________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

Vital statistics and information for obituary: _________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

Memorial type and inscription: ____________________________

____________________________________________________________________________

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MY LIFE JOURNAL

This series of questions is for recording the events of your life through your own words, as only you can express them.

My childhood
Parents and grandparents: Where did they come from?

Family history?

Are there any stories about your family or events that made an impression on you?

What are your earliest memories of your childhood?

Describe the house where you spent your childhood.

What kind of childhood games or activities did you play or participate in as a child?

Did you have a favorite toy?

What were your chores or responsibilities as a child?

What are your fondest memories of your childhood?

Tell about your brothers and/or sisters as children.

As a young child, what was your life like (be specific)?

Tell about relatives or neighbors you remember as a child.
MY LIFE JOURNAL (continued)

What was school like (classes, teachers, friends, etc)?

Were you a good student?

What did you like best about school?

What was your favorite subject?

What was your favorite sport?

Did you win any awards for athletic events?

Did you ever move? If so, from where to where?

What kinds of transportation did you use?

What did you want to be when you grew up?

Did you take any trips as a child? If so, where?

Is there anything else from your childhood you would like to talk about?

My formative or teen years

Who were your close friends?

Where did you learn your value system?

Describe your value system.

Where did you learn your work ethic?

Describe your work ethic.

What do you feel you missed during these formative years that would have benefited you as an adult?

Tell about school during these years.
Who was your favorite teacher in school and why? ____________________________________________

What was your favorite sport? ____________________________________________________________

Did you win any awards for athletic events? _______________________________________________

Who was your hero and why? ____________________________________________________________

What is the most memorable experience you had as a youth? ________________________________

Do you have any regrets from those years? _________________________________________________

What were your areas of interest as a teenager? _____________________________________________

What were some mischievous things you did as a teenager? ________________________________

Did you ever get into real trouble as a teenager? __________________________________________

What were your ambitions as a teenager? _________________________________________________

Who was the most influential person in your life as a teenager? _____________________________

Did you make any decisions during this period that may have altered the course of your life? __

What kind of jobs did you have during these years? _________________________________________

What did you learn from these jobs that has helped you in life? ______________________________

What other responsibilities did you have as a youth? ________________________________________


MY LIFE JOURNAL (continued)

What do you remember about world events during these years? ________________________________________

__________________________________________________________________________________________

How did these world events affect you and your family? ________________________________________

__________________________________________________________________________________________

Did you do any traveling as a youth? ________________________________________

What stands out in your mind as the single most important event in your life during this time period? ________________________________________

__________________________________________________________________________________________

Is there anything else you want to tell about your youth that has not been covered? ________________________________________

__________________________________________________________________________________________

My early adulthood (age 20 to 30)

If you attended an institution of higher learning, tell about your experiences. ________________________________________

__________________________________________________________________________________________

Tell about any military service you had. ________________________________________

__________________________________________________________________________________________

When did you marry, to whom and where, etc. ________________________________________

__________________________________________________________________________________________

Tell about your vocation. ________________________________________

__________________________________________________________________________________________

Tell about your family life. ________________________________________

__________________________________________________________________________________________

What “life lessons” were you learning? ________________________________________

__________________________________________________________________________________________

Did you move from where you grew up? ________________________________________

__________________________________________________________________________________________

What were your ambitions at this time in your life? ________________________________________

__________________________________________________________________________________________

What were your dreams? ________________________________________

__________________________________________________________________________________________
MY LIFE JOURNAL (continued)

What made you happy during those years?

What significant world events had an impact on you or your family?

Did you experience any personal tragedy during these years?

What impact did that tragedy have on you?

What was, in your opinion, your greatest accomplishment during this time?

What was your greatest disappointment of this time period?

Did anything occur in your life that may have altered the course of your life?

If you could change anything from those years, what would it be?

When do you think you really became an adult, and what event stands out in your mind that shows that level of maturity?

My middle adulthood (age 30 to 60)

What is the most significant thing that happened to you during your 30s?

During your 40s?

During your 50s?
MY LIFE JOURNAL (continued)

If you could go back in time are there any things you would change, omit or do differently?

What was the most meaningful personal event that occurred in your life during those years and why?

Are there any others?

Were there any major world events that shaped or changed the direction of your life?

If so, how?

Do you have any regrets?

Has your attitude toward life changed and if so, how?

Do you feel that you missed out on anything because of other commitments?

What was the most rewarding aspect of your life during those years?

Outside of your immediate family, who has had the most influence on your life and why?

What life lessons do you wish your parents had taught you that you want to be sure your children learn?

What “pearls of wisdom” would you want to pass on to your heirs?

What are you most proud of during those years?
MY LIFE JOURNAL (continued)

What brought you the most happiness during those years?

What saddens you from those years?

What do you remember with the greatest fondness?

What was the most amusing thing that happened to you during your life?

Tell about your closest personal relationship and what you received from it.

Did you achieve your goals?

Do you consider yourself a success?

Were you happy?

Did your hopes and dreams come true?

How did your faith grow during those years?

What trials occurred in your life?

What lessons did you learn as a result?

Is there anything else about you and your life during those middle adult years?
MY LIFE JOURNAL (continued)

My latter adulthood (age 60 and beyond)
What have you enjoyed most about your latter years?

What has brought you the most happiness during these years?

What has saddened you the most?

Looking back on your life, with your experience, knowledge and wisdom, what in your opinion is the most important lesson you’ve learned in your life?

If you could share lessons from your life with others, what would you want to teach them?

What has been your greatest personal accomplishment? Why?

When all else fails, what can you always count on? Why?

At this time in your life, who is the person you have most admired and why?

As you reflect on your life, if you could have done anything differently, what would it have been?

Over the course of your lifetime, what world event stands out the most in your mind?

What has changed the most over your lifetime (communications, transportation, knowledge, science, technology, family life, etc.)? Please explain.

In all of your life, what has been the single most significant event or high point?
MY LIFE JOURNAL (continued)

Please answer this question: The single most important piece of advice I can give you based on my life is: ______________________

__________________________

__________________________

How do you want to be remembered? ______________________

__________________________

Is there anything else you would want to tell about your life during your latter years? ______________________

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Additional comments: ______________________

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SPOUSE LIFE JOURNAL

This series of questions is for recording the events of your life through your own words, as only you can express them.

My childhood

Parents and grandparents: Where did they come from?

Family history?

Are there any stories about your family or events that made an impression on you?

What are your earliest memories of your childhood?

Describe the house where you spent your childhood.

What kind of childhood games or activities did you play or participate in as a child?

Did you have a favorite toy?

What were your chores or responsibilities as a child?

What are your fondest memories of your childhood?

Tell about your brothers and/or sisters as children.

As a young child, what was your life like (be specific)?

Tell about relatives or neighbors you remember as a child.
What was school like (classes, teachers, friends, etc)?

Were you a good student?

What did you like best about school?

What was your favorite subject?

What was your favorite sport?

Did you win any awards for athletic events?

Did you ever move? If so, from where to where?

What kinds of transportation did you use?

What did you want to be when you grew up?

Did you take any trips as a child? If so, where?

Is there anything else from your childhood you would like to talk about?

My formative or teen years

Who were your close friends?

Where did you learn your value system?

Describe your value system.

Where did you learn your work ethic?

Describe your work ethic.

What do you feel you missed during these formative years that would have benefited you as an adult?

Tell about school during these years.
Who was your favorite teacher in school and why? ________________________________

What was your favorite sport? ________________________________
Did you win any awards for athletic events? ________________________________
Who was your hero and why? ________________________________

What is the most memorable experience you had as a youth? ________________________________

Do you have any regrets from those years? ________________________________

What were your areas of interest as a teenager? ________________________________

What were some mischievous things you did as a teenager? ________________________________

Did you ever get into real trouble as a teenager? ________________________________

What were your ambitions as a teenager? ________________________________

Who was the most influential person in your life as a teenager? ________________________________

Did you make any decisions during this period that may have altered the course of your life? ________________________________

What kind of jobs did you have during these years? ________________________________

What did you learn from these jobs that has helped you in life? ________________________________

What other responsibilities did you have as a youth? ________________________________
SPOUSE LIFE JOURNAL (continued)

What do you remember about world events during these years? 
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
How did these world events affect you and your family? 
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Did you do any traveling as a youth? 
________________________________________________________________________
What stands out in your mind as the single most important event in your life during this time period? 
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Is there anything else you want to tell about your youth that has not been covered? 
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

My early adulthood (age 20 to 30)

If you attended an institution of higher learning, tell about your experiences. 
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Tell about any military service you had. 
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
When did you marry, to whom and where, etc. 
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Tell about your vocation. 
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________________________________________________________________________
Tell about your family life. 
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________________________________________________________________________
What “life lessons” were you learning? 
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________________________________________________________________________
________________________________________________________________________
Did you move from where you grew up? 
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________________________________________________________________________
________________________________________________________________________
What were your ambitions at this time in your life? 
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________________________________________________________________________
________________________________________________________________________
What were your dreams? 
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________________________________________________________________________
________________________________________________________________________
SPOUSE LIFE JOURNAL (continued)

What made you happy during those years? ________________________________

What significant world events had an impact on you or your family? ________________

Did you experience any personal tragedy during these years? ________________

What impact did that tragedy have on you? ________________________________

What was, in your opinion, your greatest accomplishment during this time? ________________

What was your greatest disappointment of this time period? ________________

Did anything occur in your life that may have altered the course of your life? ________________

If you could change anything from those years, what would it be? ________________

When do you think you really became an adult, and what event stands out in your mind that shows that level of maturity? ________________

My middle adulthood (age 30 to 60)

What is the most significant thing that happened to you during your 30s? ________________

During your 40s? ________________

During your 50s? ________________
SPOUSE LIFE JOURNAL (continued)

If you could go back in time are there any things you would change, omit or do differently?

What was the most meaningful personal event that occurred in your life during those years and why?

Are there any others?

Were there any major world events that shaped or changed the direction of your life?

If so, how?

Do you have any regrets?

Has your attitude toward life changed and if so, how?

Do you feel that you missed out on anything because of other commitments?

What was the most rewarding aspect of your life during those years?

Outside of your immediate family, who has had the most influence on your life and why?

What life lessons do you wish your parents had taught you that you want to be sure your children learn?

What “pearls of wisdom” would you want to pass on to your heirs?

What are you most proud of during those years?
SPOUSE LIFE JOURNAL (continued)

What brought you the most happiness during those years? ____________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
What saddens you from those years? ______________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
What do you remember with the greatest fondness? ____________________________________________________________________________
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__________________________________________________________________________________
What was the most amusing thing that happened to you during your life? ________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
Tell about your closest personal relationship and what you received from it. __________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
Did you achieve your goals? ______________________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
Do you consider yourself a success? __________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
Were you happy? ________________________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
Did your hopes and dreams come true? ______________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
How did your faith grow during those years? __________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
What trials occurred in your life? __________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
What lessons did you learn as a result? ________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
Is there anything else about you and your life during those middle adult years? ____________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
SPOUSE LIFE JOURNAL (continued)

My latter adulthood (age 60 and beyond)
What have you enjoyed most about your latter years?

What has brought you the most happiness during these years?

What has saddened you the most?

Looking back on your life, with your experience, knowledge and wisdom, what in your opinion is the most important lesson you’ve learned in your life?

If you could share lessons from your life with others, what would you want to teach them?

What has been your greatest personal accomplishment? Why?

When all else fails, what can you always count on? Why?

At this time in your life, who is the person you have most admired and why?

As you reflect on your life, if you could have done anything differently, what would it have been?

Over the course of your lifetime, what world event stands out the most in your mind?

What has changed the most over your lifetime (communications, transportation, knowledge, science, technology, family life, etc.)? Please explain.

In all of your life, what has been the single most significant event or high point?
Please answer this question: The single most important piece of advice I can give you based on my life is: ____________________________

________________________________________________________________________________________

How do you want to be remembered? __________________________________________________________

________________________________________________________________________________________

Is there anything else you would want to tell about your life during your latter years? ___________________________________________________________________

________________________________________________________________________________________

Additional comments: ________________________________________________________________

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REVIEW CHECKLIST

Please take time to review and update your workbook regularly to inform and assist your loved ones.

Review dates

Date: __________________________   Reviewed by: __________________________
Date: __________________________   Reviewed by: __________________________
Date: __________________________   Reviewed by: __________________________
Date: __________________________   Reviewed by: __________________________
Date: __________________________   Reviewed by: __________________________
Date: __________________________   Reviewed by: __________________________
Date: __________________________   Reviewed by: __________________________
Date: __________________________   Reviewed by: __________________________

Reminder

This material is presented for educational and informational purposes only and is not designed to be used for a legal document, a substitute, a replacement, a revision or a codicil to a will. It is not intended to serve as professional tax or legal advice. It covers a broad variety of topics of concern to senior adults and others, but it is by no means an exhaustive list of all the questions you may need to consider in your particular situation. Tax and probate laws pertaining to estates and estate settlements vary from state to state. GuideStone Financial Resources of the Southern Baptist Convention encourages consulting legal counsel when considering estate planning and gift-giving options. State laws govern charitable gifts, trusts and wills.