



THE ROADMAP TO YOUR COMPLETED WILL

6 Critical Components of Your Estate Plan

Your will is one of the most important documents you will ever create. Through it, you are proactively making the important, loving decision to support the needs of your family and the causes you hold most dear. But in order for it to be effective, your will must be complete and up-to-date. As you move through the will planning process, here are six critical areas you'll need to consider.



1. Priorities

Determine your priorities and objectives. What are the core values and guiding principles by which you've lived your life? What do you want to communicate to your family and the world about what matters most to you?

2. People

Identify the people you wish to remember in your plan, and determine whether they have any specific needs that must be addressed. How can you best equip the next generation for success? In what ways can you reinforce the values you're hoping to teach them? How much is enough for them? How much is too much?

3. Passions

Which ministries best reflect your values and help fulfill your personal mission? How much of your estate will you direct toward the causes you currently support? You can extend your Kingdom impact and possibly give more than anything ever possible during your lifetime by including charitable giving in your will.



Speaking with a trusted advisor can help ensure your will reflects your personal values and charitable goals.



4. Property

Take stock of what you own—your home, real estate, business interests, personal collections, even sentimental items and family heirlooms. How can your resources be used to meet the tangible and emotional needs of your loved ones? Who should be the next steward of your God-given resources?

5. Plan

For the particulars of your plan's structure, seek professional support. Your estate planner, lawyer or professional advisor can help you identify the best options and the appropriate documentation for a plan that honors God, provides for your family, minimizes delays and eliminates unnecessary taxes.

The Enemy of Your Will

One thing that should not be part of your plan? **Procrastination.**

Many people have the best of intentions, but put off establishing their estate plans indefinitely.

Approximately 60 percent of Americans die without a will, leaving their loved ones to pick up the pieces. Take action today to grant you and your loved ones peace of mind!

6. Participants

Who do you trust to implement your plan? Who will make decisions on your behalf when you are no longer able? Your representative(s) might be a family member, trust officer, accountant or other trusted acquaintance who will carry out your wishes. If you have minor children, your will should also include designated guardians, whether they are family members or close friends who share your values.



Need Help Taking the Next Step?

Through Barnabas Foundation, you have access to trusted planning assistance, all from a Christian perspective.

At no cost to you, a Barnabas Foundation planner will discuss your plans with you, helping ensure your will reflects your personal and charitable goals. To learn more, call 888.448.3040 or email planning@barnabasfoundation.org.

