

Christian Estate Planning Booklet
for
Individuals

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Estate Planning Data Form

Name: _____
First Middle Last

Address: _____
Street City State Zip

Phone Number: _____ Email: _____
Residence Business

Church: _____ City: _____

Date of Birth: _____ Last 4 digits SS # _____

U.S. Citizen: Yes No

Previous Marriage (check if applicable):

Divorced: Yes No Widowed: Yes No

Do you now have a Will or Trust? Yes No If convenient, please attach a photocopy.

Children:

1st: _____
Name Birthdate Telephone

Address

2nd: _____
Name Birthdate Telephone

Address

3rd: _____
Name Birthdate Telephone

Address

4th: _____
Name Birthdate Telephone

Address

Guardian for Children:

1st: _____
Name Relationship Telephone

Address

2nd: _____
Name Relationship Telephone

Address

Executor/Trustee:

1st: _____
Name Relationship Telephone

Address

2nd: _____
Name Relationship Telephone

Address

3rd: _____
Name Relationship Telephone

Address

Power of Attorney/Finances:

1st: _____
Name Relationship Telephone

Address

2nd: _____
Name Relationship Telephone

Address

Power of Attorney/Health Care (AHCD):

1st: _____
Name Relationship Telephone

Address

2nd: _____
Name Relationship Telephone

Address

Real Estate: List all real estate

Property A: _____

Address: _____
Street City State Zip

Date Acquired: _____ Purchase Price: _____

Please indicate ownership: Sole Owner Joint Trust Current Value: _____

Property B: _____

Address: _____
Street City State Zip

Date Acquired: _____ Purchase Price: _____

Please indicate ownership: Sole Owner Joint Trust Current Value: _____

Property C: _____

Address: _____
Street City State Zip

Date Acquired: _____ Purchase Price: _____

Please indicate ownership: Sole Owner Joint Trust Current Value: _____

Property D: _____

Address: _____
Street City State Zip

Date Acquired: _____ Purchase Price: _____

Please indicate ownership: Sole Owner Joint Trust Current Value: _____

Property E: _____

Address: _____
Street City State Zip

Date Acquired: _____ Purchase Price: _____

Please indicate ownership: Sole Owner Joint Trust Current Value: _____

TOTAL REAL ESTATE: \$ _____

Cash and Other Assets: You may use approximate value.

Cash (Approximate value.

List Banks checking, savings, CD's, etc.):

Current Value: Indicate Ownership:

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

Stocks, Bonds & Mutual Funds
other than Retirement

(List name of company, current):

Current Value: Indicate Ownership:

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

Business Interest:

Current Value: Indicate Ownership:

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

Personal Property (Vehicle, furniture,
antiques, art, jewelry, collections, etc.):

Current Value: Indicate Ownership:

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

\$ _____ Sole Owner Joint Trust

TOTAL CASH & OTHER ASSETS: \$ _____

Retirement Assets

Individual Retirement Accounts and/or Tax Sheltered Annuities:

Company:	Beneficiary:	Current Account Value:
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
TOTAL RETIREMENT ASSETS:		\$ _____

Life Insurance Policies

Life Insurance:

Insured:	Company:	Policy Type:	Beneficiary:	Death Benefit
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
TOTAL LIFE INSURANCE POLICIES:				\$ _____

TOTAL OF ALL ASSETS: \$ _____

Distributions

Gifts to Your Family: _____ %

Designate Beneficiaries and Percentage:

_____	_____
_____	_____

Gift to Charity: _____ %

CSBC Ministries to Consider:

California Missions
Evangelism
Church Planting

Church Revitalization
Migrant Missions
Women's Ministry

Disaster Relief
Jeness Park
Children's Ministries

Youth and College Ministries

Designate Beneficiaries and Percentage:

_____	_____
_____	_____
_____	_____

Conflict & Waiver Agreement – CSBC

I understand that the attorney I will be meeting with is employed by the California Southern Baptist Convention (CSBC). I understand the attorney will be reviewing my documentation and drafting my estate plan according to my instructions. I agree that the information I have provided on this form is accurate and complete and any dispute or claim arising from these services shall be submitted to arbitration. I am choosing to make a charitable gift to a Southern Baptist cause, and understand that there may be a conflict of interest. I have been advised that I am free to seek private legal counsel, should I prefer.

Signature: _____

Date: _____