

The Foundation Planned Giving Officer is available to assist you and your attorney to accomplish your charitable goals. Please feel free to contact the CCF for future assistance with in including ministries of the Diocese of Crookston in your estate plan. Other resources available through the Catholic Community Foundation include *Life Income Agreements* and *Endowment Fund Agreements*.

*“Each one, as a good manager of God’s different gifts, must use for the good of others the special gift he has received from God”  
(1 Peter 4:10)*

*The examples and information in this brochure are for illustrative and educational purposes only and should not be considered tax or legal advice. Please consult with your tax and/or legal advisors about proceeding with your estate plan.*

**For more information, call or write:**

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*Giving a Legacy of Faith—  
A Gift to Nurture the Catholic Faith*

# WHAT WILL BE YOUR LEGACY? TAKE THE TEST...



***Giving A Legacy of Faith—  
A Gift to Nurture the  
Catholic Church***

## What Will Be Your Legacy?

Everyone has an estate, regardless of its size. A plan is necessary to determine how your estate will provide for you, your family, and the ministries important to you. Designing an estate plan takes time and thought. By answering the following questions, you can begin to identify how much planning and organization is necessary to achieve your goals.

1. T F NA I have a will.
2. T F NA I have lived in the same state since my will was signed.
3. T F NA My marital status is the same as when I signed my will.
4. T F NA I am married to the same person as when I signed my will.
5. T F NA I have the same number of children and grandchildren as when I signed my will.
6. T F NA I have arranged guardianship for my minor children.
7. T F NA None of my children have reached majority since I signed my will.
8. T F NA I have provided for my child who has a special need through special needs trust or other arrangements.
9. T F NA My wealth or assets have not changed since I signed my will.
10. T F NA I know how my assets are titled. (*Your name or/and Spouse*)
11. T F NA My assets are titled consistent with my will.
12. T F NA I am relying on joint ownership arrangements to transfer some of my assets.
13. T F NA My will does not attempt to gift an asset that is held in joint ownership with *right of survivorship*.
14. T F NA Any partnership interests I own can be transferred through my will.
15. T F NA I have made provisions to transfer my business interests how I want them transferred.
16. T F NA My spouse and/or child(ren) have sufficient knowledge/ability to manage any assets I leave to them.
17. T F NA All the people named in my will are still alive.

18. T F NA The people named in my will have the same needs in amount and type of assistance as when I signed my will.
19. T F NA The executor (or personal representative) named in my will is still alive and is willing and able to serve.
20. T F NA My parish is named to receive a bequest or gift through my will.
21. T F NA I know how my IRA, Pension Plan, 401(k), 403(b) and other deferred income vehicles will be distributed upon my death.
22. T F NA I have provided for the church ministries that are important to me through my estate plan.
23. T F NA Charities, which are important to me, are provided for through my estate plan.
24. T F NA My life insurance coverage is adequate.
25. T F NA I have discussed my estate plans with my spouse, children, and other family members.
26. T F NA I have completed the *Notes for My Friends and Family Booklet* available through the Catholic Foundation.
27. T F NA I am aware that most states do not allow heirs to remove contents of my safe deposit box without court supervision.
28. T F NA I know that proper planning may reduce estate settlement costs.

### What Your Answers Mean

Add up your “False” answers. The scale below gives insight as to where you need to concentrate your planning efforts. For any level on the scale, you can work with our Planned Giving Officer to leave a Legacy of Faith.

**0-6 false answers:** Your estate plan is in good shape! Review the questions you answered “False.” Is there a common theme?

**7-15 false answers:** Your estate plan needs some work. Review the questions you answered “False” for a common theme. Contact the appropriate advisor. Our Planned Giving Officer can assist with your plans.

**16-24 false answers:** You need to review your situation. Everyone has an estate that will be distributed upon death. By planning for its distribution, you can determine who will get what and how. The Foundation provides a workbook for wills as a planning resource through which you can start to build the blueprint for your estate plan.

**25 and more false answers:** Call your advisors immediately and begin developing your estate plan.