



GUIDE TO CONSTRUCTING A CHRISTIAN WILL

A will is a legal document that provides instructions for how to manage your assets, care for those you are responsible for, and handle those matters that need to be resolved after your death. But most wills don't answer the deeper questions about who you were during life, and what values you want to pass on.

Ultimately a life is made up of so much more than just our "stuff" and a Christian Will can help to share with your survivors an understanding of what made you - you, and how you want your values to live on in the generations to come.

This guide will walk you through writing a basic Christian Will that you can include as a part of your estate planning documents, as well as help you to think about how you can provide financially both for your loved ones and for organizations that reflect the values you have lived.

"The Lord said to Moses, 'Soon you will lie down with your ancestors... Now therefore write this song, and teach it to the Israelites.' When Moses had finished reciting all these words to all Israel, he said to them: Take to heart all the words I am giving in witness against you today; give them as a command to your children, so that they may diligently observe all the words of this law."

– Deuteronomy 31–32

- Start by writing down the basics: your name, when and where you were born, and family structure. Then add to that picture with more of the pieces that describe what you have done in your life: relationships, marriages, children, what kinds of work have you done, what hobbies you have had, or adventures have you engaged in?
- Now we can start to fill in the story: what was the world like when you were born? What changes most impacted you as you grew up? How is the world different today than when you were a child, a young adult, in mid-life?
- Remember you are telling the story of what matters to you and why – describe the work you have done (paid or unpaid), why you did it, what you learned from doing that work? If you could go back would you change something?
- Finally imagine you are suddenly 50 years in the future and have the chance to talk to your descendants: tell them what values you hope they learned from you, and what it would look like if they were expressing those values in the world.

You can use elements from this guide to constructing a Christian will to help inform your legal will. A charitable bequest is a beautiful way to express the values that have informed your life, and to share those values with your family through an example of generosity. As you inventory your assets and decide how to distribute those gifts you can include gifts that support the organizations and causes that have been meaningful to you throughout your life.

When to Review your Will

- Birth or adoption of children
- Children have grown or married
- Loss of a spouse or loved one
- Divorce or marriage
- Move to another state
- Change in financial situation or holdings

How to Get Started

Taking an inventory of all assets and liabilities is groundwork for a good estate plan. An Estate Planning Workbook is available from the Foundation to assist you in this process. It is important to share this information with children or the executor you may have named.

After you have compiled a comprehensive list, decide how you want your assets distributed. List your heirs and what you would like each to receive, including charitable beneficiaries you would like to support. Consider your personal goals for the management and protection of your resources.

There is more than one way to achieve your goals. A bequest can be made directly to the Church; we refer to this as an outright gift. Another option is to make a bequest to the Foundation to establish an endowment fund, which will be professionally managed to provide income in perpetuity to the Church or charitable cause you designate. As you familiarize yourself with the various estate planning concepts and charitable giving options, you will be able to make informed decisions regarding your plan. Consult with your legal and financial advisors to discuss and finalize your plan.

Formalizing your Will

Once you have considered how you would like your assets distributed, and to whom, you are ready to formalize your will. An attorney should do this, so that proper language and terms are used. Employing an attorney will ensure that your intentions are clear and concise. This prevents the possibility of misunderstandings and delays in probating your will and ensures your will complies with the specific requirements of your state.

It is never too early to write a will; it can only be too late. Writing your will is the most important step you can take in planning your estate.

Without it, the probate court will make decisions about the distribution of your assets and appoint guardianship of any survivor left in your care. No assets will be given to any charitable organization, no matter how important that organization was to you during your lifetime.

Executors

Once you have reviewed your assets and listed your beneficiaries, it is important to name the person(s) who will see that your wishes are carried out. The executor, subject to state law, may be a friend, relative or representative from the bank or trust company. An alternative to your first choice should always be named.

The materials provided in this guide are examples of a general and informative nature, and do not constitute advice, legal or otherwise. Through careful estate planning, you can attain your objective for providing for loved ones as well as for Presbyterian missions and ministry. Please consult with your attorney or advisor for financial and estate planning advice before you take any action.



200 E 12th Street, Jeffersonville, IN 47130
800-858-6127 | presbyterianfoundation.org