



**Washington County
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PLANNED GIVING BRIEF

ESTATE PLANNING MADE EASY



In a nutshell, estate planning is really what you want done with what you own. The good news is that you can provide for the people and causes important to you by taking simple steps now. Creating your plan for the future can be easy and even enjoyable.

While an attorney should always draft your will, we can help demystify the process and prepare you for meeting your attorney with these simple steps:

1

Itemize Your Assets

Take a piece of paper and draw a line down the middle. On the left side, write something you own. On the right side, write the name or names of the person(s) you wish to receive that item or asset.

2

Organize Your Estate

Make the process of organizing your estate and plans even easier by downloading our free wills guide. This fill-in-the-blank guide walks you through the process of gathering information about what you own, your family, and your goals.

3

Write Down Questions

Consider practical questions, such as, "If I give my house to my adult son and my adult daughter, what will they do with it?" If you come up with a question that you can't seem to find a solution for, make a note to ask your attorney.

4

Review Your Plans for Family

You can give some assets to family right away and others over time. Ask us how you can provide an income stream or a lump sum to a loved one and achieve your personal and inheritance goals.

5

Consider Charity

Remember to include any charities that are important to you in your plan. If you have given during life, then consider providing for these organizations through your estate. Ask us about plans like charitable remainder trusts and gift annuities that can help your family and our mission.

6

Visit Your Attorney

Bring the information you have gathered and questions to your attorney. Your attorney can draft a will or trust that will achieve your goals. You complete the plan through a simple signing process.

7

Update Your Plan

Update your estate plan as your life changes. Marriages, births, and deaths are all events that may make you want you to revise your plans.

