



My Legacy

AN ESTATE PLANNING KIT



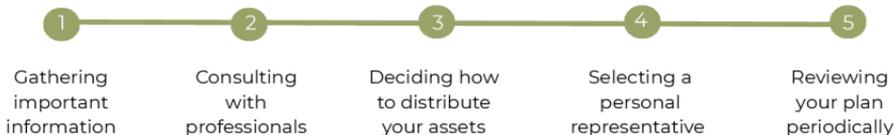


Thank you for using **Lowcountry Food Bank** and **Lowcountry Food Bank Foundation's** estate planning workbook. Print and digital versions are free to be shared and edited.

The information that you'll be entering is sensitive and confidential and should only be shared with your personal representative or another highly trusted individual.

This is a free guide to help you plan. You should not return or share this with Lowcountry Food Bank or Foundation.

Whether you're just getting started on your first will or updating your existing estate plan, this simple-to-use resource can walk you through the steps to creating a document that takes care of the people and the causes you care about.



The information provided in this booklet is offered as general education and is not intended to be a substitute for professional estate planning or legal advice.

Because the laws of each state vary and your own circumstances are unique, you should seek the advice of your own attorney, tax advisor, and / or financial planner before deciding on a course of action when creating your estate plan.

1. Gather Important Information

Compile the following personal and financial information below. Documenting this information will be helpful as you put together a legal plan and leave a roadmap for your executor or personal representative.

Personal Information

Full name

Date of Birth

Social Security Number

Driver's License State and #

Your Spouse or Partner

Full name

Date of Birth

Social Security Number

Driver's License State and #

Additional Documents: List Location

Birth Certificate

Passport

Social Security Card

Marriage Certificate

Military Separation Papers

List other documents and their location (i.e. any prenuptial agreements, date of death, divorce, annulment or legal separation)

1. Gather Important Information

Your Assets (i.e. bank and portfolio accounts, annuities, pensions, retirement accounts, life insurance policies, and real estate).

These assets can be left to a charitable beneficiary directly through a form provided by the institution.

Banking

Bank Account: Checking Savings Other

Bank Name

Website Username

Account Number

Website Password / PIN

Notes:

(Any joint account holders or payable-on-death beneficiaries)

Bank Account: Checking Savings Other

Bank Name

Website Username

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Annuities

Annuity Company

Contract or Policy Number

Phone Number

Annuity Details

Notes:

Annuity Company

Contract or Policy Number

Phone Number

Annuity Details

Notes:

1. Gather Important Information

Pensions

Notes:

Notes:

Retirement Accounts

1. Gather Important Information

Retirement Accounts Continued

Investment Company & Type (401 (k), IRA, etc.)

Employer Name (if applicable)

Investment Website

Investment Company Phone

Website Username

Account Number

Website Password / PIN

Investment Company & Type (401 (k), IRA, etc.)

Employer Name (if applicable)

Investment Website

Investment Company Phone

Website Username

Account Number

Website Password / PIN

Life Insurance

Name of Insured Person

Insurance Company Name

Policy Number

Phone Number

Coverage Amount

Primary Beneficiary

Coverage Type (whole or term)

Contingent Beneficiary

1. Gather Important Information

Real Estate

Property Address

Type of Ownership: Individual Joint

Property Tax ID & Classification

Paid w/ Escrow? Y / N

Improvements

Location of Deed

Purchase Price & Date

Mortgage Company

Estimated Current Value

Property Address

Type of Ownership: Individual Joint

Property Tax ID & Classification

Paid w/ Escrow? Y / N

Improvements

Location of Deed

Purchase Price & Date

Mortgage Company

Estimated Current Value

Notes:

1. Gather Important Information

Other Investment Accounts

Investment Company

Broker Name (if applicable)

Phone

Account Number

Description of Investments

Brokerage Website

Website Username

Website Password / PIN

Investment Company

Broker Name (if applicable)

Phone

Account Number

Description of Investments

Brokerage Website

Website Username

Website Password / PIN

Investment Company

Broker Name (if applicable)

Phone

Account Number

Description of Investments

Brokerage Website

Website Username

Website Password / PIN

1. Gather Important Information

Payments You Make

Monthly Bills (cell phone, utilities, etc.)

Biller Name

Pay from Account

Account Number

Website Username

Due Date: Auto-pay? Y / N

Website Password / PIN

Biller Name

Pay from Account

Account Number

Website Username

Auto-pay? Y / N

Website Password / PIN

Biller Name

Pay from Account

Account Number

Website Username

Auto-pay? Y / N

Website Password / PIN

Biller Name

Pay from Account

Account Number

Website Username

Auto-pay? Y / N

Website Password / PIN

1. Gather Important Information

Payments You Make Continued

Credit Cards

Credit Card Company

Account Number

Credit Card Company

Account Number

Credit Card Company

Account Number

Website Username

Website Password / PIN

Website Username

Website Password / PIN

Website Username

Website Password / PIN

Loans

Loan Company

Account Number

Type of Loan

Loan Company

Account Number

Type of Loan

Website Username

Website Password / PIN

Notes

Website Username

Website Password / PIN

Notes

1. Gather Important Information

Your Passwords

Cell Phone Number

Password

Cell Phone Number

Password

Computer Username

Password

Computer Username

Password

Email Address

Password

Email Address

Password

Email Address

Password

Email Address

Password

Social Media Username

Password

Social Media Username

Password

Other Account / Username

Password

Other Account / Username

Password

Other Account / Username

Password

Other Account / Username

Password

2. Consult with a Professional

As a thank you for being a friend of **Lowcountry Food Bank** and **Lowcountry Food Bank Foundation**, we have partnered with FreeWill, a no-cost, simple tool to create your will in 20 minutes or less.



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Will or Trust

Do you have a will? Y / N

Are you the creator or beneficiary of any trusts? Y / N

Document Title

Location of Document

Date Prepared

Location of Copies

Prepared by Name

Additional Notes

Name of executor, trustee or
personal representative

Name of alternate executor,
trustee or personal representative

Assets Not Covered in Your Will

Some components of your estate plan are distributed by means other than your will and may require additional paperwork.

While it is possible to write your own will, it is preferable to seek legal counsel.

The information provided in this booklet is offered as general education and is not intended to be a substitute for professional estate planning or legal advice.

2. Consult with a Professional

Estate Planning Team

Financial Advisor's Name

Phone

Company Name

Email

Insurance Professional's Name

Phone

Company Name

Email

Trust Officer's Name

Phone

Company Name

Email

Tax Professional's Name

Phone

Company Name

Email

Insurance Professional's Name

Phone

Company Name

Email



Gift Intent Form

If you have already included **Lowcountry Food Bank Foundation** in your Will or Trust, please fill out this quick **Gift Intent Form**.

All donors who make a planned gift are recognized in
The Full Plate Society.

4. Select a Representative or Trustee

It's important to name a personal representative or trustee—someone who will ensure that the provisions you included in your will or trust are carried out.

A representative can be an individual, a bank with trust powers, or a trust company.

Health Care Directives

Do you have a living will / advance health care directive? Yes No

Do you have a health care power of attorney? Yes No

Name of person appointed
to act on your behalf

Name of alternates
to act on your behalf

Notes:

(i.e.) Document Title, Date Prepared, Location of Copies

Power of Attorney

Have you signed a financial durable power of attorney? Yes No

Effective date of power holder to act: Immediately Upon incapacity

Document Title

Location of Document

Date Prepared

Location of Copies

Prepared by Name

Additional Notes

Name of person appointed
to act on your behalf

Name of alternates
to act on your behalf

5. Review Your Plan Periodically

There are many reasons to review your will or trust from time to time, including life changes, changes in tax laws, or including additional charitable contributions.

Creating an estate plan can seem overwhelming, but having a plan in place can bring you and those you care about peace of mind. As you determine your legacy, make the future easier for the people and causes you love.

Final Arrangements

Have you pre-arranged funeral plans? Yes No

Preferred preparation: Cremation Burial Donation of Body

Funeral Home Preference

Cemetery Preference

Notes:

If you are interested in learning more about planned giving options with **Lowcountry Food Bank Foundation**, please contact our Director of Fundraising at (843) 747-8146 ext. 123.



Gift Intent Form

Lowcountry Food Bank Foundation is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax ID #86-1286512. Contributions are deductible as allowed by law.

Notes

Notes



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Charleston, SC 29414
(843) 747-8146 ext 123

lowcountryfoodbank.org/planned-giving