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Revocable Living Trust + Pour Over Will

Basics

Trust Name

Estimated total value of assets you will title into the name of your trust

Is this a joint trust between two spouses?

Yes Your trust will create two pour over wills, one for each of you. Consider information in those sections individually. In the beneficiary section, your primary beneficiary will be your spouse, as it indicates when only one of you passes away.

No If two spouses are creating separate trusts, please fill out separate prep guides.

Guardianship (Required if you have children – we recommend having a primary and two alternates)

Primary choice

Secondary choice

Tertiary choice

Pet Care (optional section)

Amount to provide for pets' care

Who will care for your pets

Nominees: Trustee (successor trustees once you (both) pass away)

Primary choice

Secondary choice

Tertiary choice

Nominees: Executor of Pour Over Will

Primary choice

Secondary choice

Tertiary choice

Spouse's primary choice

Spouse's secondary choice

Spouse's tertiary choice

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Charitable Intentions

This section will enable you to leave gifts to your charities as primary beneficiaries of your trust.

To leave a gift to The Christian & Missionary Alliance or to your local Alliance church, you will select the corresponding button in this section of the online platform and complete any blank fields.

If you expect that the ministries and charities you support may change over the years, consider managing those charitable gifts through a Legacy Advised Fund or Donor Advised Fund designation. Either of these funds allow you to easily change beneficiaries without needing to update your will or contact your financial institutions. For more information or to set up one of these funds before completing your will, please contact our Gift & Estate Design team at Orchard Alliance.

If you prefer to leave a gift to ministry as a secondary or tertiary beneficiary of your trust, skip this section and fill in the ministry information in the corresponding sections below. Also skip this section if you plan to do all your charitable giving directly through beneficiary designations of assets you do not transfer into the trust. To learn more about tax-wise giving through beneficiary designations, you may wish to read our article on Tax-Wise Concepts for Effective Planning.

Trust Beneficiaries

Primary

Name	Relation	Amount/Percentage

Secondary

Name	Relation	Amount/Percentage

Tertiary

Name	Relation	Amount/Percentage

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Property (list of assets to transfer into the trust)

Common assets for funding a trust: real estate, stocks and bonds, bank accounts, valuable personal property

Assets that should not be put in a trust: retirement accounts, life insurance policies, pension plans, vehicles

Type of Asset	Description	Ownership	Is there a Title Document?
			☐ Yes ☐ No ☐ Unsure
			☐ Yes ☐ No ☐ Unsure
			☐ Yes ☐ No ☐ Unsure
			☐ Yes ☐ No ☐ Unsure
			☐ Yes ☐ No ☐ Unsure
			☐ Yes ☐ No ☐ Unsure
			☐ Yes ☐ No ☐ Unsure

Custodianship (required if you are leaving assets to minor children)

Primary choice

Secondary choice

Funeral Wishes (optional – this is a separate instruction letter and not a legally binding part of your will)

Who will carry out my funeral and final resting place wishes

Funeral service wishes

Final resting place wishes

Charities to support in lieu of flowers

No Contest Clause

If you think there is the possibility of someone contesting your trust, please give us a call so that we can better understand the situation and help you plan your estate to avoid such a contest.

Anonymous Charitable Donations

Do you want charities who receive gifts from your trust to know who you are?

Yes This is helpful to charities for their planning purposes. If you are supporting Christian organizations, this could be an extension of your testimony; charities typically send thank-you notes to their donors' families.

No Your charities may still receive anonymized data

Trusts for Younger Beneficiaries

We recommend utilizing this section if you have minor children or young adults and wish to delay their inheritance until they have had more time to develop financial maturity and healthy practices.

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Living Will/Advance Healthcare Directive

Preferred Provider Information (optional)

Primary Physician Name

Office Address

Email Address

Preferred Hospital

Hospital Address

Healthcare Agents (we recommend having at least one alternate)

Primary Agent

Primary Agent

Home Address

Phone Number | Relation

Alternate Agent

Alternate Agent

Home Address

Phone Number | Relation

You may choose when your agent's powers become effective:
Immediately, at a specific date, or when your physician determines you are incapacitated.

HIPAA Agents (authorized to access your private medical records but NOT make medical decisions)

HIPAA Agent

HIPAA Agent

Values & Wishes (optional)

You will have the ability to individually express any values you would like your Healthcare Agent to consider when making medical care decisions. You may also list your specific wishes for decisions regarding mental health care and end-of-life care. If you have any questions about the options in this section, we recommend you select the **?** button in that section for additional information. This section is also a great place to add biblical language or parts of your testimony if you feel so led! Click here to read an example from one person's will.

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Financial Power of Attorney (POA)

Agents (we recommend having at least one successor)

Primary Agent

Home Address

Phone Number | Relation

Co-agent (optional) ☐ Must act jointly

Home Address

Phone Number | Relation

Successor Agent

Home Address

Phone Number | Relation

You may choose when your agent's powers become effective (if they are immediately effective, this is a Durable POA; if they are only after physician certification of incapacity, this is a Springing POA).

Powers

You will have the ability to individually allow or restrict your agent's powers. If you have any questions over the powers in this section, we recommend you select the **?** button in that section for additional information. Many POA documents default to allowing as many powers as possible because it's difficult to know in advance what powers may become necessary if you are incapacitated. The most commonly selected restriction is over the gifting power. Utilizing the gifting power can help agents take advantage of longterm expense planning if needed, while limiting this power can help prevent asset depletion or abuse of power. If you have significant concerns about which powers to allow or restrict for your agents, we recommend consulting with an estate planning attorney.

For assistance connecting with an attorney and other resources in your area, please contact us by email - WillPlanning@OrchardAlliance.org or call 866-802-1490.