

UNITED WAY OF DANE COUNTY FOUNDATION

WE ARE PLEASED TO OFFER YOU THIS WORKBOOK,
DESIGNED TO HELP YOU GATHER AND ORGANIZE ALL PERTINENT
ESTATE PLANNING INFORMATION IN ONE PLACE.

ESTATE PLANNING WORKBOOK



Estate Planning Workbook

Introduction

Volunteer leaders recognized the importance of creating a base of support for United Way of Dane County’s mission—funds that would advance our work in perpetuity while honoring each donor’s wish to create a legacy of local, effective philanthropy. United Way of Dane County Foundation was established in 1993 and continues to partner with community members seeking to invest in lasting change. We’re honored to be a resource in your estate and gift planning.

Many people know the importance of having an estate plan, yet they do not maintain a current will that reflects their present wishes. Planning and preparing ahead of time, and reviewing your estate plan regularly can prevent misunderstandings later and allows for your survivors to sort through complex issues with greater ease, clarity, and hopefully, harmony. To assist with your estate planning, United Way of Dane County Foundation is pleased to offer you this Estate Planning Workbook, designed to help you gather and organize all pertinent estate planning information in one place before you contact your attorney.

Through thoughtful planning, you can be assured that your wishes for your property and other assets, custody for minor children, and any other specific requests you define will be carried out according to your plan. It’s also the best way to ensure that your philanthropic values will be administered according to your wishes, and that your legacy will continue for generations to come.

Thank you to **Boardman & Clark LLP** for underwriting the production of this workbook and to **United Way of Rock River Valley** for providing content.

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You and Your Family

Your Personal Information:

Date _____

Your Full Legal Name _____

Date of Birth _____ Gender: Male Female

Present Marital Status:

Married Single Divorced Legally Separated Widowed

If you are widowed, what date did this occur? _____

Home Address _____

City _____ State _____ Zip _____

Home Phone () _____

Work Phone () _____

Mobile Phone () _____

E-mail _____

Employer _____

Retired _____

Job Title _____

You and Your Family

Your Spouse:

Spouse's Full Legal Name _____

Date of Birth _____ Gender: Male Female

Present Marital Status:

Married Single Divorced Legally Separated Widowed

Home Address _____

City _____ State _____ Zip _____

Home Phone () _____

Work Phone () _____

Mobile Phone () _____

E-mail _____

Employer/Retired _____

Job Title _____

Property Assets

Real Estate Owned (Main Residence/Second Residence/Vacation Home)

Type of Property & Location	Cost When Acquired	Title*	Current Value	Debt/Lender

*Husband, wife, trust, jointly (indicate other joint tenant if not spouse)

Personal Property

Type of Property	Title*	Cost Basis	Date of Investment	Current Value
Furniture/Household Furnishings				\$
Jewelry				\$
Antiques/ Collections				\$
Tools & Equipment				\$
Musical Instruments				\$
Automobiles				\$
				\$

*Husband, wife, trust, jointly (indicate other joint tenant if not spouse)

Location of any Stock Certificates, Bonds, Options, etc., that are not held in Brokerage Accounts

Safe Deposit Boxes

Box Location	Box #	Location of Keys	Names of Others with Authorized Access

Insurance

Life Insurance you own (on your own life)

Company	Type of Policy	Beneficiary	Amount
			\$
			\$
			\$
			\$
			\$

Companies or Organizations that own insurance policies on your life

Company	Type of Policy	Beneficiary	Amount
			\$
			\$
			\$

Insurance owned by you on the lives of others

Company	Type of Policy	Policy #	Coverage
			\$
			\$
			\$

Location of Life Insurance Policies

Other Insurance

Company	Type of Policy	Policy #	Coverage
			\$
			\$
			\$
			\$

Benefits

Individual Retirement Accounts, Pensions, Retirement or Death Benefit Plans

Fund Name & Company	Account #	Beneficiary	Telephone	Amount
				\$
				\$
				\$
				\$
			Total	\$

Location of any employment contracts or business agreements relating to interests in corporations, partnerships and sole proprietorships

What you owe

Mortgage/Auto/Installment Contracts/Charge Accounts/Other Loans

To Whom Debt or Mortgage is Owed	Address	Payment Date	Current Amount Owed
			\$
			\$
			\$
			\$
			\$
Total Approximate Indebtedness			\$

*Husband, wife, trust, jointly (indicate other joint tenant if not spouse)

Money owed to you

Money invested in Mortgages, Personal Loans Trust Deeds

With Whom & Address	Cost When Acquired	Title*	Current Value
			\$
			\$
			\$
			\$
			\$
			\$
			\$

*Husband, wife, trust, jointly (indicate other joint tenant if not spouse)

I am currently I expect to be the beneficiary of a bequest.

Testator's Name _____

Approximate value \$ _____

Total approximate value of estate \$ _____

I am currently I expect to be the beneficiary of other income or assets.

Source's Name _____

Approximate value \$ _____

Trusts

Location of any trusts and any amendments to trusts that you have created, or under which you are a beneficiary and names of trustees.

Name _____ Telephone _____

Address _____

Tax Records

Location of tax records

Name _____ Telephone _____

Address _____

Key Contacts

Executor

Name _____ Telephone _____

Address _____

Alternate Executor

Name _____ Telephone _____

Address _____

Guardian for Your Children

Name _____ Telephone _____

Address _____

Alternative Guardian for Your Children

Name _____ Telephone _____

Address _____

Trustee for Children's Interest

Name _____ Telephone _____

Address _____

Your Accountant

Name _____ Telephone _____

Address _____

Your Attorney

Name _____ Telephone _____

Address _____

Your Financial Planner

Name _____ Telephone _____

Address _____

Your Faith Based Institution

Name _____ Telephone _____

Address _____

CHARITABLE PLANNED GIVING PARTNER, i.e., United Way and/or another charitable organization of choice:

United Way of Dane County Foundation, Inc.

2059 Atwood Avenue

Madison, WI, 53704

(608) 246-4399

EIN: 39-1763471

www.unitedwayanecounty.org

and/or

Letter of Last Instructions

You may wish to write a letter of last instructions to your surviving spouse or other persons. This letter is not legally binding, as a will is meant to be, but it can be of great help. It allows you to communicate, informally and personally, helpful information or specific instructions, such as:

- **Location of your will, safety deposit boxes, important papers, and records**
- **Digital, social media or online presence: account locations, names and passwords**
- **Names and addresses of persons to help surviving spouse**
- **Names, addresses, and telephone numbers of individuals you wish to be notified of your death**
- **Funeral and burial instructions**

Notes

UNITED WAY OF DANE COUNTY FOUNDATION

OUR COMMUNITY IS DYNAMIC. THE FOUNDATION PROVIDES A LONG-TERM BASE OF SUPPORT AND THE FLEXIBILITY TO STRENGTHEN OUR COMMUNITY AS IT CHANGES. THROUGH THE FOUNDATION, INDIVIDUALS AND FAMILIES CAN LEAVE A LASTING LEGACY OF CARING.

The Foundation is helping to achieve the critical goals identified by the community as the Agenda for Change. Every year, it contributes to the resources United Way mobilizes to strengthen our community and increases their impact. By investing in the Foundation today, you help tackle the root causes of problems in perpetuity. The principal of your gifts will be maintained while the income is used to create real results, today and tomorrow.

THERE ARE MANY WAYS TO CONTRIBUTE TO THE UNITED WAY FOUNDATION, INCLUDING:

Cash Donation – The simplest way to support the Foundation is with a gift of cash. Many donors choose to make gifts to honor or memorialize a caring community member.

Establishment of a Named Fund – By contributing \$5,000, either with one outright gift or a multi-year pledge, a permanently named fund can be established. This allows the donor to make an annual gift to United Way or support an area of interest.

Gifts of Appreciated Securities – Depending on the circumstances, gifts of appreciated stocks, bonds or other securities held in excess of one year are often very tax-wise and allow donors to give generously to United Way.

Gifts Through a Donor's Will – Testamentary gifts allow a donor to bequest a percentage of an estate, bequest a specific gift amount or bequest a residuary estate. The legal name to use in these documents is United Way of Dane County Foundation, Inc.

Retirement Funds, Life Insurance and Bank Accounts – Naming the United Way Foundation as a beneficiary is a generous way to make a legacy gift “outside” of a will.

Charitable Gift Annuities – Donors receive annual payments through the investment of these irrevocable gifts. Upon the donor's death, the remainder of the gift goes to the Foundation.