

ADVISORS:

Name

Full Address

Accountant: _____

Attorney: _____

Banker: _____

Broker: _____

Insurance Agent: _____

Parish/Mission: _____

Priest: _____

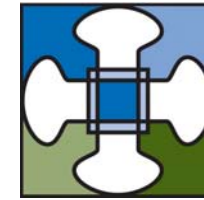
Trust Officer: _____

The Colorado Episcopal Foundation, through its professional staff, is available to assist you in family financial and charitable gift planning.* Charitable gifts may provide generous benefits to the donor and beneficiaries during life. Charitable gift planning in many instances can raise your income and lower your taxes.

Notes:

**A will is a legal document. For legal questions, contact your attorney.*

For questions concerning your personal tax situation, contact your tax advisor.



Colorado Episcopal Foundation

General Information for Making a Will

From the Canons of the Protestant Episcopal Church in the United States of America, Title III, Canon 14, Section 2 (b) (4) states: "It shall be their duty [clergy] to instruct all persons in their charge concerning Christian stewardship, including: The responsibility of all persons to make a will as prescribed in the Book of Common Prayer, page 445."

The Book of Common Prayer states: "The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses."

1. Full Legal Name: _____

Address: _____

City: _____ County: _____

State: _____ Zip: _____

Birth Date: _____ Social Security Number: _____

Service: Branch _____ Discharge Certificate Located at: _____

Serial Number: _____ Date of Service: _____

Marital Status: Single Married Divorced Remarried Separated Widowed

2. Do you have a Will? Yes No (If "no," go to #4)

3. Since making your last will have you:

- Moved to another state?
- Sold or bought property?
- Celebrated the birth of a child or grandchild?
- Changed your marital status?
- Changed your mind about your personal representative (executor)?
- Changed your mind about the guardian for your child?
- Decided to include the church (as a residual beneficiary to) in your will?
- Done family financial and charitable gift planning?

If the answer is "Yes" to any of the above, your Will may need to be updated. Complete the following questions, and then consult with your attorney.

Colorado Episcopal Foundation
1300 Washington Street ▪ Denver, CO 80203
303.534.6778 ▪ FAX 303.534.6012 ▪ Email: office@coef.org ▪ Web Site: www.coef.org

FAMILY INFORMATION

4. Legal Name of Spouse: _____

Address: _____

City: _____ County: _____

State: _____ Zip: _____

Birth Date: _____ Social Security Number: _____

Does your spouse have a Will? Yes No

5. CHILDREN

List your children, including those legally adopted.

Full Name	Address	City/State	Birth Date
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Dependents:

Guardianship [Person(s) to be the guardian(s) of my children]

Name: _____ Phone: _____

Address: _____ City: _____

State: _____ Zip: _____

Alternate Name: _____ Phone: _____

Address: _____ City: _____

State: _____ Zip: _____

LIABILITIES

NOTES AND MORTGAGES:

Name of Lender	Description	Amount	Interest Rate	Amount of Payment
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

LEASES:

OTHER LIABILITIES:

PROPERTY:

Real Estate Description & Location	Original Cost	Present Market Value	Amount of Mortgage

INSURANCE POLICIES:

Company	Policy Number	Benefit Amount

OTHER ASSETS:

Description	Location	Cost	Present Value

6. POWER OF ATTORNEY

Have you ever granted a power of attorney? Yes No

If yes, was it a "durable" power of attorney? Yes No

Have you ever granted a health care power of attorney? Yes No

List the name, address and phone number of the person who holds your power of attorney.

7. PERSONAL REPRESENTATIVE

Person(s)/Trust Company to be the personal representative of my estate:

Name: _____

Address: _____ City: _____

State: _____ Zip: _____

Alternate Name: _____

Address: _____ City: _____

State: _____ Zip: _____

8. LOCATION OF MY RECORDS

Tax Records: _____

Safe Deposit Box and Key: _____

Will: _____

Birth Certificate: _____

Social Security Card: _____

Insurance Policies: _____

Living Will: _____

Funeral Directions: _____

9. BENEFICIARY INFORMATION

(Persons, Parish/Mission, or charitable associations you wish to thank for being a part of your pilgrimage.)

Name: _____

Name: _____

Name: _____

Name: _____

Residual Beneficiary: _____

(The final or residual beneficiary receives what is left over after all other bequests have been paid according to your Will. For example, your Parish/Mission or the Colorado Episcopal Foundation.)

MAKING GIFTS OF PERSONAL AND REAL PROPERTY

Any asset may be given to the church by your Will.

There are also a number of beneficial ways to give assets during your lifetime.

Real estate and securities are deductible at full fair market value. Such gifts might increase your income and lower your taxes. You may wish to transfer title on your home, mountain cabin or farm to the church, which gives you favorable tax advantages plus continued use of the property until death.

Gifts of tangible, personal property related to the purposes of the church are also deductible at full fair market value.

FINANCIAL INFORMATION

PRESENT ANNUAL INCOME

Salary: \$ _____

Investment/Dividend Income: \$ _____

Social Security/Pension Income: \$ _____

Other: \$ _____

ASSETS

BANK ACCOUNTS/SAVING INSTITUTION ACCOUNTS/OTHER INCOME PRODUCING ACCOUNTS:

Name of Institution	Type	Account Number
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

STOCKS/MUTUAL FUNDS:

Corporation	# of Shares	Market Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

RETIREMENT ACCOUNTS:

Institution Name	Account Number	Present Value
_____	_____	_____
_____	_____	_____