

Michigan Conference Planned Giving and Trust Services

It is the ministry of the Planned Giving & Trust Services Department* to assist members and friends with the preparation of three important legal documents: Will, Power of Attorney for Health Care, and Power of Attorney for Finance.

Here is how we help. At your request, we make a brief visit to share information on the importance of these documents and how they help with your life and estate planning. We gather information the attorney needs to formulate your documents. You will have a phone consultation with the attorney before having an opportunity to review and approve your documents. Then we will print and prepare your documents and get them to you for signing.

How you manage and distribute the assets God entrusts to you is a personal and spiritual matter. As Seventh-day Adventist Christians we recognize that the God of Heaven owns all things. He empowers His people with the ability to gain wealth and entrusts them with His multiplied blessings of time, talents and possessions. The godly steward glorifies God by using these blessings to provide for personal needs, the needs of others, and the advancement of God's redemptive work. God's estate management and distribution methods differ from man's, necessitating the study and application of principles found in the Bible and Spirit of Prophecy.

Love for God motivates us in our management and distribution of the assets God has given us. When you no longer need the assets God entrusts to you, what would He have you do with them? Consider this: *"In disposing of your property by will (or trust) to your relatives, be sure you do not forget God's cause. You are His agents, holding His property; and His claims should be your first consideration."* (4 Testimonies pg. 483)

What makes up your estate? Land, cash, clothes, furniture, life insurance, investments, bank accounts, royalties. In short: everything you own! Generally it is best to think in terms of giving a percentage of your estate to your beneficiary(ies). If you have minor age children, consider establishing a trust to provide for their needs.

You may divide your estate between charities, family, and friends.

_____ % to _____

_____ % to _____

_____ % to _____

_____ % to _____

*The Michigan Conference Planned Giving and Trust Services Department is fully accredited and its trust officers are certified by the North American Division of Seventh-day Adventists Trust Certification and Accreditation Committee. This brochure is intended for educational purposes only as an example of possible ways of gifting assets. It is not intended as professional or tax or legal advice; consult an attorney or tax advisor about your specific situation.

Who Should Help Manage and Distribute Your Estate?

Guardians for minor age children:

(This person is responsible for day to day care and decisions regarding the children's welfare)

1st Choice _____

2nd Choice _____

Trustee for Children's Trust:

(Minor children cannot inherit directly, so any gifts to them would need to be set up in a trust fund)

___ same person(s) as Guardian? OR

1st Choice _____

2nd Choice _____

Personal Representative (Executor):

(This person sees that the directives in the Will are carried out)

1st Choice (Spouse if living) _____

2nd Choice _____

3rd Choice _____

Power of Attorney documents:

The Will gives direction for what happens to your possessions after you die. The Power of Attorney documents enable you to name people who can assist you if you are living, but unable to do things for yourself. For instance:

Who would make health care decisions for you if you are not able to?

1st Choice _____

2nd Choice _____

Who would make personal and business decisions for you if you are not able to?

1st Choice _____

2nd Choice _____

Notes:
