



THE FOUNDATION

JEWISH COMMUNITY FOUNDATION
LOS ANGELES

Estate Planning Workbook

PREPARING FOR AN ESTATE PLANNING CONFERENCE WITH YOUR ATTORNEY

THE FOUNDATION
JEWISH COMMUNITY FOUNDATION
LOS ANGELES

ESTATE PLANNING

WORKBOOK

Jewish Community Foundation of Los Angeles

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ESTATE PLANNING WORKBOOK

INTRODUCTION

Many people know the importance of having a will and an estate plan, yet many people do not maintain a current will that reflects significant life changes and outlines their present wishes. Planning and preparing your will and estate ahead of time, and reviewing it regularly can prevent misunderstandings later and allows for your survivors to sort through complex issues with greater ease, clarity and hopefully, harmony. To assist you with your will and estate planning, the Jewish Community Foundation of Los Angeles 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.

A will and an estate plan ensure that your assets will be transferred according to your wishes upon your passing. If you die without a will, your property is distributed to relatives according to state laws, regardless of your wishes. Additionally, the state would be responsible for appointing a guardian from among your relatives for any minor children. By having a will, you can be assured that your wishes for your property and other assets, custody for minor children, and any other specific wishes you delineate will be carried out according to your plan. Additionally, a will is the best way to ensure that your philanthropic values will be administered according to your wishes, and that your legacy will continue well into the future.

If you do not have a will, or if you have not updated your will in some time, we encourage you to do so. Knowing your affairs are in order provides peace of mind for you and your loved ones.

The first step in will and estate planning is gathering your information, so you can look at it as a whole when you meet with your attorney. We hope this workbook will serve as a useful tool to help you organize and prepare all of your information for your attorney.

For more information about how The Foundation can be of further service to you regarding wills and estate planning, please call The Foundation's Development office at (323) 761-8704.

ESTATE PLANNING WORKBOOK

TABLE OF CONTENTS

Complete your Personal Information	1-3
Complete information about Property	4-8
Complete information about Insurance	9-10
Complete information about IRAs, Pension, Retirement or Death Benefits	11
Complete information about What You Owe	11
Complete information about Trusts and Tax Records	12
Complete information about Key Contacts	12-13
Plan Your Estate Distribution	14-15
Model Forms of Bequests from Wills	16
Model Forms of Bequests from Living Trusts	17-18
Arrangements and Last Instructions	19
Your Notes	20

If spouse/domestic partner is deceased, details:

Name: _____ Date of Marriage: _____ Date of Death: _____

Location of will/codicils: _____

Location of trust/amendments to trust: _____

Location of federal estate tax return: _____

Location of gift tax returns: _____

There is is not a prenuptial agreement.

Location of prenuptial agreement _____

U.S. Citizen? Yes No

If not a U.S. citizen by birth, indicate date and place of naturalization.

Naturalization Date _____ Place _____

Naturalization Papers Located _____

Spouse: U.S. Citizen? Yes No

If not a U.S. citizen by birth, indicate date and place of naturalization.

Naturalization Date _____ Place _____

Naturalization Papers Located _____

Other Citizenship _____

NEAREST RELATIVES

List in order

1. Children 2. Grandchildren 3. Brothers and/or sisters 4. Parents 5. Nieces and/or nephews

Name	Relationship	Date of Birth	Address

SAFE DEPOSIT BOXES

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

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 \$ _____

PROPERTY

PERSONAL PROPERTY

Include personal effects, automobile(s), jewelry, household effects, furniture, artifacts, etc.

Item	Location	Approximate Value If Sold Today
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$

CASH (CHECKING, SAVINGS, AND MONEY MARKET)

Bank and Address	Title*	Account #	Amount

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

CERTIFICATES OF DEPOSIT

Bank and Address	Certificate #	Maturity Date	Title*	Amount
				\$
				\$
				\$
				\$
				\$
				\$
				\$

STOCKS, BONDS, MUTUAL FUNDS HELD IN BROKERAGE ACCOUNTS

Name of Broker/Account	# of Shares	Company	Title*	Value
				\$
				\$
				\$
				\$
				\$
				\$

Name of Broker/Account	# of Shares	Company	Title*	Value
				\$
				\$
				\$
				\$
				\$
				\$

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

SECURITIES NOT HELD IN A BROKERAGE ACCOUNT

Type of Security	Title*	Serial #	Date of Purchase	Amount
				\$
				\$
				\$
				\$
				\$
				\$

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

LOCATION OF ANY STOCK CERTIFICATES, BONDS, OPTIONS, ETC., THAT ARE NOT HELD IN BROKERAGE ACCOUNTS

MONEY INVESTED IN MORTGAGES, PERSONAL LOANS, TRUST DEEDS (MONEY OWED TO YOU)

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

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

REAL ESTATE OWNED

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

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

OTHER ASSETS

Type of Property	Title*	Cost Basis	Date of Investment	Current Value
				\$
				\$
				\$
				\$
				\$
				\$

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

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	Insured	Beneficiary	Amount
				\$
				\$
				\$
				\$

LOCATION OF LIFE INSURANCE POLICIES

OTHER INSURANCE

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

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
LOANS

To Whom Debt Or Mortgage Is Owed	Address	Payment Date	Current Amount Owed
			\$
			\$
			\$
Total Approximate Indebtedness			\$

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 _____

ALTERNATE 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 _____

SYNAGOGUE/RELIGIOUS INSTITUTION

Name _____ Telephone _____

Address _____

RABBI/SPIRITUAL LEADER

Name _____ Telephone _____

Address _____

CHARITABLE PLANNED GIVING PARTNER:

Jewish Community Foundation of Los Angeles
6505 Wilshire Blvd., 12th Floor
Los Angeles, CA 90048
323-761-8704

PLAN YOUR ESTATE DISTRIBUTION

You do not need to describe every item of your personal or real property in your will. However, if there is some specific asset that you want to go to a certain individual, list it here. You may include individuals, other than nearest relatives, whom you wish to include in your estate planning. Also, if you wish to leave a specific sum of money to a person or charity, state the amount and the name.

Person	Address	Relationship	Item, Property, or Sum of Money	Locations of Asset

CHARITIES

Charity Name	Address	Telephone	Amount
			\$
			\$
			\$
			\$
			\$
			\$

After the specific bequests (if any), the simplest way to divide the residue of your estate is by percentages. Name the person or charity you wish to remember, and then state what percentage of the total remaining amount of your estate each is to receive.

_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %

MODEL FORMS OF BEQUESTS *FROM WILLS*

A. Outright bequest

I give (cash of \$_____) or (specified property) to the Jewish Community Foundation of Los Angeles.

B. Gift to The Foundation's Unrestricted Endowment Fund

I give (cash of \$_____) or (specified property) to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered as part of The Foundation's Unrestricted Endowment Fund with distributions to be made as part of The Foundation's annual grants process. Distributions shall be made annually based on a spending rate in accordance with The Foundation's policy and guidelines.

C. Gift to a Field of Interest Fund*

I give (cash of \$_____) or (specified property) to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered by The Foundation as the _____ Endowment Fund. Distributions shall be made annually based on a spending rate in accordance with The Foundation's policy and guidelines. Distributions shall be for the following charitable purpose(s):

Example 1: Aid for children

Example 2: Aid for elderly

The Board of Trustees of The Foundation may alter the foregoing field of interest designations in the event that either or both of them shall, by reason of changed conditions, become impossible to fulfill, impracticable or undesirable as determined by The Foundation's Board of Trustees.

D. Gift to The Foundation's Restricted Endowment Fund*

I give (cash of \$_____) or (specified property) to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered by The Foundation as a restricted fund for the benefit of _____:

Example 1: United Jewish Fund of the Jewish Federation Council of Greater Los Angeles

Example 2: BJE Scholarship Fund

The Board of Trustees of The Foundation may alter the foregoing restricted designation in the event that it becomes impossible to fulfill, impracticable or undesirable as determined by The Foundation's Board of Trustees.

**This form is for illustration purposes. The Foundation would be pleased to discuss how Field of Interest or Restricted Funds may be tailored to meet the unique needs of a particular donor.*

MODEL FORMS OF BEQUESTS FROM *LIVING TRUSTS*

A. Outright bequest

Upon the death of _____ (the Trustor(s)) (cash the sum of \$_____) or (describe gift:) (_____) shall be distributed to the Jewish Community Foundation of Los Angeles.

B. Gift to The Foundation's Unrestricted Endowment Fund

I give (cash of \$_____) or (specified property) to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered as part of The Foundation's Unrestricted Endowment Fund with distributions to be made as part of The Foundation's annual grants process. Distributions shall be made annually based on a spending rate in accordance with The Foundation's policy and guidelines.

Upon the death of _____ (the Trustor(s)) (cash the sum of \$_____) or (describe gift:) (_____) shall be distributed to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered as part of The Foundation's Unrestricted Endowment Fund with distributions to be made as part of The Foundation's annual grants process. Distributions shall be made annually based on a spending rate in accordance with The Foundation's policy and guidelines.

C. Gift to a Field of Interest Fund*

Upon the death of _____ (the Trustor(s)) (cash the sum of \$_____) or (describe gift:) (_____) shall be distributed to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered by The Foundation as the _____ Endowment Fund. Distributions shall be made annually based on a spending rate in accordance with The Foundation's policy and guidelines. Distributions shall be for the following charitable purpose(s):

Example 1: Aid for children

Example 2: Aid for elderly

Subject to the right of the Board of Trustees of The Foundation to alter the foregoing designations in the event that either or both of them shall, by reason of changed conditions, become impossible of fulfillment, impracticable or undesirable as determined by The Foundation Board of Trustees.

D. Gift to The Foundation's Restricted Endowment Fund*

Upon the death of _____ (the Trustor(s)) (cash the sum of \$_____) or (describe gift:) (_____) shall be distributed to the Jewish Community Foundation of Los Angeles (The Foundation) to be held and administered by The Foundation as a restricted fund for the benefit of _____:

Example 1: United Jewish Fund of the Jewish Federation Council of Greater Los Angeles

Example 2: BJE Scholarship Fund

The Board of Trustees of The Foundation may alter the foregoing field of interest designation in the event that it becomes impossible to fulfill, impracticable or undesirable as determined by The Foundation Board of Trustees.

**This form is for illustration purposes. The Foundation would be pleased to discuss how Field of Interest or Restricted Funds may be tailored to meet the unique needs of a particular donor.*

ARRANGEMENTS

LOCATION OF LIVING WILL, DURABLE POWER OF ATTORNEY FOR HEALTH,
MEDICAL DIRECTIVES ORDER OR OTHER POWERS OF ATTORNEY

MY PREFERRED FUNERAL AND BURIAL INSTRUCTIONS ARE

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
- 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