

# Fundraiser for Twin Oaks with The Gift of Planning

Congratulations on deciding to protect your family with important legal documents! Accomplishing this isn't complicated or difficult. Here are things to think about to get you started. Bring this form to Twin Oaks on February 7 at 7 PM to create your documents that night, or use it to complete the process at your leisure on our website. This is just a worksheet to help you make these decisions. The online interview at [thegiftofplanning.com/twinoaks](http://thegiftofplanning.com/twinoaks) is where you will create your legal documents. If you are a married couple, each partner will need to have thought about the questions below.

## **If I'm married, do I even need a Will? Doesn't everything just go to my spouse?**

One of the most important reasons for creating a Will is to plan for the unfathomable possibility that you and your partner might die at the same time—you won't have control over what happens then.

### **Who will be my Executor?**

Your executor (also called a Personal Representative) will carry out your legal and financial matters (including any online accounts and social media) after your death, so it's a good idea to pick someone you trust, but also someone who is organized and competent. Most people choose their spouse. That can be perfect, but you will want to have a backup in case you and your spouse die at the same time.

My Executor \_\_\_\_\_

My Backup Executor \_\_\_\_\_

### **Who will be the Guardian for my children?**

Choosing a guardian is very personal and intuitive—and so important. It's possible your spouse could die at the same time you do or before your children are adults. Appointing a guardian prevents a judge from choosing a guardian for your minor children and avoids financial messes that will occur without proper stewardship. And again, also choose a backup.

My Guardian(s) \_\_\_\_\_

My backup Guardian(s) \_\_\_\_\_

### **Who will get my assets?**

As you work through the online interview, you'll need to designate your beneficiaries—the people who will receive your property. These are normally your spouse, children, other relatives, close friends and charities or organizations. Most of the answers will be simple—my spouse and kids get it all! But because you'll be given a chance to give specific gifts in the online interview, but you might want to start thinking about this now.

Remember that your entire documents package will include a Will, Power of Attorney and Advance Health Care Directive. You will be able to check this off your to-do list and help raise money for Twin Oaks! Go to [thegiftofplanning.com/twinoaks](http://thegiftofplanning.com/twinoaks) to get started.