

# ESTATE PLANNING DATA FORM



THE BAPTIST  
**Foundation**  
OF CALIFORNIA™

# INSTRUCTIONS

Please fill in as neatly and completely as possible. All information provided is held in strict confidence by The Baptist Foundation of California and its representatives. Please use full legal names, including middle names for children. Please provide approximate values for assets and liabilities and fill in to the fullest extent you can.

**Items 1 through 13:** Personal information; self-explanatory.

**Items 14 and 15:** Name a guardian only if you have a minor child; the trustee and executor will have control over all assets and make discretionary decisions regarding the handling and distribution of the assets.

**Items 16 to 21 (Assets & Liabilities):** Three columns are shown for listing separate property for either husband or wife and the third column community property. A spouse only has separate property if he or she brought property into a marriage or received a gift or inheritance which did not include the other spouse.

**Item 16:** Here, list whom you want acting as your agents under your power of attorney and healthcare directive. Spouses are generally the primary agents; you may select joint or co-agents if you desire.

**Items 17 and 18:** list any real estate (homes, land, buildings, etc.) and your best estimate of their current value. List bank accounts at a typical balance. Here, list only brokerage accounts that are not retirement accounts.

**Item 19:** Approximate values of retirement accounts are sufficient and it is important that you list the beneficiaries. These assets must be held in individual names, not jointly.

**Item 20:** List each insurance policy for each spouse separately. The type of policy would be term, whole life or otherwise. If you own a key man insurance policy related to a business please note that on the form.

**Item 21:** Under Liabilities, list approximate principal balances owed, not monthly installments.

**Totals Page:** Here, just add the totals from the prior pages, sign and date.

**Statement of Faith:** These are potential Statements of Faith are testimonies that can be in your will. These are suggestions only. Your testimony is up to you.

- 1 Name \_\_\_\_\_
- 2 Spouse's Name \_\_\_\_\_
- 3 Address \_\_\_\_\_
- 4 Phone Numbers: (Primary) \_\_\_\_\_ (Secondary) \_\_\_\_\_  
(His Cell) \_\_\_\_\_ (Her Cell) \_\_\_\_\_
- 5 Primary Email \_\_\_\_\_ Secondary E-mail \_\_\_\_\_
- 6 Occupation (H) \_\_\_\_\_ (W) \_\_\_\_\_
- 7 Church \_\_\_\_\_ City \_\_\_\_\_
- 8 Date of Birth (H) \_\_\_\_\_ Date of Birth (W) \_\_\_\_\_  
Date of Marriage (if applicable) \_\_\_\_\_
- 9 U.S. Citizen (H) Yes No (W) Yes No
- 10 Did you attend The Baptist Foundation of California Seminar?  
Yes No Date \_\_\_\_\_ Seminar Presenter \_\_\_\_\_
- 11 Prior Marriage (check if applicable) Divorced (H) \_\_\_\_\_ (W) \_\_\_\_\_  
Widowed (H) \_\_\_\_\_ (W) \_\_\_\_\_
- 12 List of **full legal names** of children, deceased children and children of pre-deceased children. Please identify children of previous marriages as to which spouse they belong. Please use the designations "B" for "Both," "H" for "Husband" or "W" for "Wife."

Name	Whose Children	Sex	Date of Birth	Address, Phone Number and Email (Street, City, State, Phone Number and Email)

13

Do you now have a Will or Trust? \_\_\_\_\_ If convenient, please attach a photocopy.

14

## NAMING A GUARDIAN\*

If you have minor children, a guardian should be named in your Will. Nominate the person you wish to take care of your children until they turn age 18. You may wish to name a different person as Guardian of the Person, who will have custody and raise the children and as Guardian of the Estate, who will manage the child's assets absent their placement in a trust.

1st

Name

Relationship

Phone

Mailing Address

Email Address

2nd

Name

Relationship

Phone

Mailing Address

Email Address

3rd

Name

Relationship

Phone

Mailing Address

Email Address

15

## NAMING A TRUSTEE OR EXECUTOR

An executor must be named and an alternate should be named. An executor should be one who knows your affairs and is competent to handle financial matters. Usually a husband will name his wife and the wife will name her husband. If this is the case, write "spouse" in the place of name under the 1st choice. The alternates may be anyone over the age of 18 or if you desire a Christian professional administrator, you may name The Baptist Foundation of California.

1st

Name

Relationship

Phone

Mailing Address

Email Address

2nd

Name

Relationship

Phone

Mailing Address

Email Address

3rd

Name

Relationship

Phone

Mailing Address

Email Address

## SELECTION OF AGENTS UPON INCAPACITY

### I. Financial Decisions: Powers of Attorney.

Names, addresses, phone numbers and emails under Power of Attorney (if spouse, just write “spouse”; include at least two alternate, you may list co-agents):

**1st** \_\_\_\_\_  
Name Relationship Phone

\_\_\_\_\_  
Mailing Address Email Address

**2nd** \_\_\_\_\_  
Name Relationship Phone

\_\_\_\_\_  
Mailing Address Email Address

**3rd** \_\_\_\_\_  
Name Relationship Phone

\_\_\_\_\_  
Mailing Address Email Address

### 2. Medical: Agent for Healthcare Directive.

Names, addresses, phone numbers and emails under Advance Healthcare Directive (if spouse, just write “spouse”; include at least two alternates, you may list co-agents):

**1st** \_\_\_\_\_  
Name Relationship Phone

\_\_\_\_\_  
Mailing Address Email Address

**2nd** \_\_\_\_\_  
Name Relationship Phone

\_\_\_\_\_  
Mailing Address Email Address

**3rd** \_\_\_\_\_  
Name Relationship Phone

\_\_\_\_\_  
Mailing Address Email Address

REAL ESTATE

List all of your real estate assets (including mineral rights) indicating approximate values. (Feel free to estimate.) Please attach additional page(s) if necessary.

A. \_\_\_\_\_  
*Address of Property (Street Address, City, State)*

Date Acquired: \_\_\_\_\_ Purchase Price: \$ \_\_\_\_\_

Mortgaged: ☐ Yes ☐ No

Nature of Property: ☐ Commercial ☐ Residential

☐ Other \_\_\_\_\_

Current Value		
Your Sole & Separate	Spouse's Sole & Separate	Jt, Tenancy/ Community Property
\$	\$	\$

B. \_\_\_\_\_  
*Address of Property (Street Address, City, State)*

Date Acquired: \_\_\_\_\_ Purchase Price: \$ \_\_\_\_\_

Mortgaged: ☐ Yes ☐ No

Nature of Property: ☐ Commercial ☐ Residential

☐ Other \_\_\_\_\_

Current Value		
Your Sole & Separate	Spouse's Sole & Separate	Jt, Tenancy/ Community Property
\$	\$	\$

C. \_\_\_\_\_  
*Address of Property (Street Address, City, State)*

Date Acquired: \_\_\_\_\_ Purchase Price: \$ \_\_\_\_\_

Mortgaged: ☐ Yes ☐ No

Nature of Property: ☐ Commercial ☐ Residential

☐ Other \_\_\_\_\_

Current Value		
Your Sole & Separate	Spouse's Sole & Separate	Jt, Tenancy/ Community Property
\$	\$	\$

<b>Total Real Estate Assets</b>	\$	\$	\$
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CASH AND OTHER ASSETS

Please use approximate values. It is not necessary to list account numbers. (Retirement assets are to be listed in section 19).

<b>Cash</b> (List financial institution name and address and checking/savings CDs/etc. as well as approximate value):	<b>Your Sole &amp; Separate</b>	<b>Spouse's Sole &amp; Separate</b>	<b>Jt. Tenancy/ Community Property</b>
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

<b>Stocks, Bonds and Mutual Funds</b> Other than Retirement Account (e.g. 401K, 403b, IRA) (List company name and address, current value, tax/cost basis)	<b>Your Sole &amp; Separate</b>	<b>Spouse's Sole &amp; Separate</b>	<b>Jt. Tenancy/Community Property</b>
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

<b>Business Interest</b> Sole Proprietor, Jt. Venture, L.L.C., L.P., G.P., P.C., S. or C. Corp., etc (List company name, address and business type):	<b>Your Sole &amp; Separate</b>	<b>Spouse's Sole &amp; Separate</b>	<b>Jt. Tenancy/Community Property</b>
	\$	\$	\$
<b>Personal Property</b> Vehicles, furniture, antiques, art, jewelry, collections, electronics, etc.			
	\$	\$	\$
<b>Business Interest</b> Mortgages, trust deeds, notes, etc.			
	\$	\$	\$
<b>Miscellaneous:</b> _____			
	\$	\$	\$

<b>Total Real Estate Assets</b>	\$	\$	\$
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19

## RETIREMENT ASSETS

Your retirement Plan, IRA and/or Tax Sheltered Annuities (eg 401k, 403b, IRA)  
(Do not include pensions which carry no death benefits)

Company and Type of Account	Beneficiary	Current Account Value

Your Spouse's Individual Retirement Accounts and/or Tax Sheltered Annuities

Company and Type of Account	Beneficiary	Current Account Value

Total of Retirement Accounts

Total of Spouse's Retirement Accounts

## LIFE INSURANCE POLICIES

### Your Life Insurance

Insured	Company	Type of Policy	Beneficiary	Death Benefit
				\$
				\$
				\$
				\$
				\$

### Your Spouse's Life Insurance

Insured	Company	Type of Policy	Beneficiary	Death Benefit
				\$
				\$
				\$
				\$
				\$

### Total Life Insurance Assets

Your Life Insurance \$

Spouse's Life Insurance \$

## LIABILITIES

Estimate Balances Owed.

<b>Mortgages:</b>	Your Sole & Separate	Spouse's Sole & Separate	Jt. Tenancy/ Community Property
Home Address	\$	\$	\$
Other Properties	\$	\$	\$
<b>Loans:</b> If you have more than one, please give totals			
Automobile	\$	\$	\$
Bank	\$	\$	\$
Installment Contracts	\$	\$	\$
Life Insurance	\$	\$	\$
<b>Charge Accounts</b>	\$	\$	\$
<b>Other Debts</b>	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
<b>Total Liabilities</b>	\$	\$	\$

## YOUR TOTAL TAXABLE ESTATE:

Transfer the totals from Sections 17 through 20 to the boxes below. Add the assets in Sections 17 through 20, then subtract the liabilities in Section 21.

	Your Sole & Separate	Spouse's Sole & Separate	Jt. Tenancy/ Community Property
<b>A. TOTAL SECTION 17: Real Estate</b>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<b>B. TOTAL SECTION 18: Cash and Other Assets</b>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<b>C. TOTAL SECTION 19: Retirement Assets</b>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<b>D. TOTAL SECTION 20: Life Insurance Policies</b>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<hr/>			
<b>E. TOTAL SECTIONS 17, 18, 19 &amp; 20</b>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<b>F. TOTAL SECTION 21: Liabilities</b>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<hr/>			
<b>G. TOTAL TAXABLE ESTATE (SUBTRACT TOTALS ON LINE F FROM TOTALS ON LINE E)</b>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<hr/>			
<b>TAXABLE ESTATE (ADD ALL TOTALS ON LINE G):</b>	\$ <input type="text"/>		

I/We acknowledge that the information provided in this form is accurate and complete.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

For further information, please call or write:

**The Baptist Foundation of California**

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info@bfcalf.org

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## POSSIBLE STATEMENT OF FAITH OPTIONS FOR LAST WILL AND TESTAMENT:

### Statement 1

It is with joy I declare that I am a member of the family of God, having accepted Jesus Christ as my personal Savior, and it is my desire through this my Last Will and Testament to give witness of my love for and gratitude to God the Father, Son and Holy Spirit.

### Statement 2

Realizing "it is the lot of men once to die and then cometh judgement," I believe that God has made me His own child and has kept me in personal fellowship with Him so that, purely by His grace, I can say: "The course that God set I have finished, and I have kept the faith. The future holds for me the crown of righteousness which God, the righteous judge, will give to me in that day....and not, of course, only to me, but to all those who have loved what they have seen of Him" (2 Timothy 4:7-8). My deepest wish is that all who read this will have, or will come to have, the same trust in Jesus so that we might be reunited in heaven forever.

### Statement 3

Realizing the uncertainty of this life, I have full confidence and trust in my Lord and Savior, Jesus Christ, in His death on the cross for my sins, His shed blood as an atonement for my soul, and know by that faith in His sacrifice of the cross for me, I have eternal life.

### Statement 4

Having herein disposed of all my earthly possessions, I now commit my soul unto the hands of my Savior, Jesus Christ, in full confidence that having redeemed me and washed me in His most precious blood, He will present me faultless before the throne of my Heavenly Father, not because of works of righteousness that I have done, but according to His marvelous grace and mercy through His atoning death on the Cross of Calvary. My deepest wish is that all who read this statement will have, or will come to have, that same trust in Jesus.

### Statement 5

Being of sound mind, disposing memory, full legal age, and thankful to Almighty God for life and all He has graciously entrusted to me, knowing the uncertainties of life and desiring to make a fitting and public witness to my Christian faith, and not acting under duress, menace fraud, restraint, or undue influence of any person whomsoever, I hereby make, publish, and declare this instrument to be my Last Will and Testament hereby revoking and cancelling all former Wills and Codicils made by me.

### Statement 6

I have now disposed of all my property. There is one more thing that I wish I had the power to give to my loved ones. That gift would be the gift of faith in Jesus Christ. If they have that gift and if I have not been able to give them a dollar, they will be rich. But if they do not have that faith and they have all the wealth in the world, they will be truly poor indeed.

### Statement 7

Your mother/father and I, having enjoyed God's love and blessings, wish to reflect that love and those blessings from you, from birth we loved you and until our death we will love you though our love has been imperfect, it has been constant, and our desire is that it reflects in some way the perfect love that God has for each of us. As a confirmation of our parental love, we have provided for you out of our material goods in a manner we believe will honor the Lord and will be the most beneficial to you. However, the things that we have left are God's gift, we know that one day we will be reunited. Until then, may the Lord bless you and keep you; may the Lord make His face to shine upon you and be gracious unto you; may the Lord turn His face toward you and give you peace.

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## NOTES



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