Estate Planning

The crowning act of Christian stewardship

"Behold, what manner of love the Father hath bestowed upon us, that we should be called the sons of God. This love is without a parallel, giving to men the relationship of sons to God. Therefore the Father expects obedience from His children; therefore He requires a right disposition of the property He has placed in their hands."

Ellen White 4 Testimonies, p. 124

Create documents that:

- **Name guardians for your minor children who share your values.**
- **Distribute your money, real estate, and personal property according to your wishes.**
- **Provide for the needs of you and your family.**
- **Remember the Lord's work.**

Attorney Fee Reimbursement

If it is your desire to leave a gift to one of the Oklahoma Conference organizations (such as your local church, school, Wewoka Woods Adventist Center or conference funds), **we will reimburse you 100%** of the attorney fees per household for Wills, Power of Attorneys, Living Wills, or Trusts if you remember Oklahoma Conference or any of our organizations with a 10% gift for Wills and 15% gift for a Trust.

King Law Firm in Oklahoma City provides services for our Planned Giving documents. Please contact Joan Rupe or Carlos Portanova at 405-721-6110 for more information on how to create your documents.

If you want additional information, please check the following options below and send this portion to the **Oklahoma Conference of Seventh-day Adventists, P.O. Box 32098, Oklahoma City, OK, 73123.**

☐ A Christian Will

☐ Revocable Trust

☐ Irrevocable Trust

☐ Life Income Gifts

☐ Without obligation, I would appreciate a personal visit from a Trust Services Representative.

Name _____

Address _____

City_____ State _____Zip Code_____

Email_____ Phone _____

Oklahoma Conference Planned Giving

In partnership with God

PLANNED GIVING & TRUST SERVICES

Seventh-day Adventist® Church

OKLAHOMA CONFERENCE

Estate Planning

Last Will & Testament

Your Will is one of the most important documents you will sign during your lifetime. Its preparation requires careful thought and wise planning to be certain your material possessions that God has trusted to your care will be distributed in accordance with your wishes.

Who needs a Will?

- Every adult who has accumulated a lifetime of assets.
- Young parents who are concerned about the guardianship of their children in the event of a common disaster.
- Single persons of all ages who desire to direct what is to happen to their assets.

Is a Will necessary?

If you die without a Will, the court must divide your property according to the law of the state in which you reside at the time of death. These laws do not take into consideration the educational or financial needs of your family, or the Lord's work.

The Oklahoma Conference and its employees no longer accept the role of Executor/ Personal Representative in new Wills.

Living Trust (higher costs up front)

Assets in trust by-pass probate (succession) helping to save your estate time and money.

Reasons to consider a Living Trust:

- When you have a large number of properties/assets in your estate
- To save your grown children from themselves (spend-thrift protection)
- Ensure family's privacy and all information is kept in strict confidence
- When you desire a complex distribution
- Assure that the family beneficiaries will get their honest portion, as per agreement

The Oklahoma Conference and its employees no longer accept the role of trustee or successor trustee on new living Trusts.

Charitable Remainder Unitrust (Give-It-Twice)

Transfer IRA or other assets into trust with charity with lifetime or term (up to 20 years) payments to one or more beneficiaries (children or others). Remainder of trust goes to charity at the end of term. This trust is an irrevocable contract. ***Available through Southwest Estate Services.***

Beneficiary Deed

Transfers real estate to named individual(s) or organization(s) outside of probate at death of last spouse. An affordable alternative to a trust for simple estates.

Beneficiaries on Retirement (IRA) Funds, Life Insurance, and Bank Accounts (checking & savings)

Transferable on death benefits are available on many financial accounts. Take time to name alternate beneficiaries and these individuals or organizations can receive the funds directly without passing through probate/succession. If naming multiple beneficiaries, use percentages to direct distribution.

Charitable Gift Annuity – A Gift & Lifetime return

- A person who enters into a charitable gift annuity agreement with a qualified charity makes an irrevocable gift to the organization and receives fixed payments for life.
- Offer members and friends the opportunity of creating a gift annuity for the benefit of a church organization; opportunity to support God's cause while at the same time preserving, what may be essential, life income.

Oklahoma Conference requirements: **$25,000** minimum and **over 65 years old** to receive returns.

Available through Southwest Estate Services: www.southwesternadventist.org/trust.