

DO YOU HAVE A WILL?

Is it up-to-date? If you were to die today, would your property go to the people and charities for whom you want to provide and in the manner you would like to provide?

Do you have peace of mind that your plans are in order?



Despite the importance of having a will (or trust), many Americans never get around to drafting one. For those who do have a will, it was drawn up many years ago and hasn't been looked at since. Now may be the right time to review or create your will, during Make A Will Month.

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May We Help?

Please contact me with more information about planned gifts and estate planning strategies

I have already included your organization in my will or trust

Please send me your FREE estate planning guide

The best way to contact me is by:

Email Mail Telephone

Name

Street

City

State/Zip

Phone

Email

All inquiries are treated with complete confidentiality.

This information is not intended as tax, legal, or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.



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MAKE A WILL MONTH Finishing Well





Benefits of a Will AND Well-Constructed Estate Plan

A will and well-thought-out estate plan will . . .

- Afford you the opportunity to create a final legacy and testimony to share your core values and beliefs with your family and friends
- Provide an appropriate inheritance that meets the needs of family, individuals and charities important to you
- Ensure the transfer of your estate with the fewest delays
- Avoid unnecessary costs, estate taxes, taxes on retirement plans and other expenses
- Minimize interpersonal conflicts and maximize a positive impact on family and others
- Direct the selection of a guardian for your heirs who are minors
- Give you peace of mind

DOWNSIDE OF NOT HAVING A WILL

If you die “intestate” — that is, without a will — the state in which you reside will . . .

- Oversee the distribution of your assets according to a set formula. The distributions will likely not be in alignment with how and to whom you want your estate distributed, and thus could disinherit people for whom you wanted to provide.
- Appoint a representative to look after the interests of your children who are minors.

Are you willing to risk these outcomes and entrust these decisions to your State?

BUT MY PLANS ARE IN ORDER

Perhaps they are; however . . .

- Have you and your family experienced significant life changes since your plan was created — marriages, divorces, births, deaths, or changes in financial situation and needs?
- Will your estate be distributed to people and charities that are aligned with your current wishes?
- Have you considered the potential impact of income, estate and/or capital gains taxes on your plan?
- Do you have any heirs that lack the necessary maturity and ability to handle an inheritance? Too much inheritance may lead to unhappiness and create a disincentive for someone to finish school, work hard and make sound financial decisions.