Charitable Estate Planning Self-Assessment Form

The following short questionnaire is designed to help our Givers when preparing or revising their estate plans. It is truly a self-assessment form. It will help you gather information and consider options without having to share the contents with us to benefit.

And it's designed to be easy to use. It's not an intense data gathering form to feed a program that spits out a report. Rather, it's a checklist to help you prepare for fruitful conversations with your estate planning attorney.

In our experience, a great many Christians struggle to achieve the right balance between supporting ministries and leaving assets to their children and grandchildren. Often, we feel trapped between the fear of spoiling our children and the fear of creating bitterness or resentment by "leaving it all to charity." Fortunately, much of the time these are false fears as there are many ways to do both. And since God did not call us to fear or anxiety but rather to trust and joy, this is a place where our faith in Christ can have very practical results.

Please feel free to contact us if you are considering significant charitable giving as part of your estate plan and want to chat with us about what's possible. We are happy to answer questions by phone or in person. We do not prepare wills or trusts (because we do not practice law) and we are not an end-user of the charitable funds that pass through our hands; all of that is for the ministries our Givers support. Our only goal is to make it easier for you to work with your estate planning attorney to achieve the God-honoring use of your assets that you truly desire.

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NCF California
Charitable Estate Planning Self-Assessment Form

1. List the names, approximate age and relationship of people to whom you may want to leave assets. (E.g., Husband or wife, children, grandchildren, friends, care givers) (attach pages if necessary).

   ____

   ____

   ____

   ____

2. Your Approximate Annual Income ______________________________________

3. Your Approximate Annual Gifts to Charity ($ or %) ______________________________________

4. Unified Credit Remaining ______________________________________

5. Do you own any of the following Assets?

Do you own any of the following Assets?	What is the Value of Each? (round to nearest $100,000)
___ Diversified Stock & Bond Portfolio	$___________________
___ Investment Real Estate	$___________________
___ Qualified Benefits (Pension, IRA, 401k)	$___________________
___ Permanent Life Insurance	$___________________
___ Qualified (incentive) Stock Options	$___________________
___ Non-qualified Stock Options	$___________________
___ Variable Annuities	$___________________
___ Closely Held Business Interests	$___________________
___ Vacation Home(s)	$___________________
___ Restricted Stock	$___________________
___ Farm or Ranch Properties	$___________________
___ Gold, silver or Collectibles (e.g., Art)	$___________________
___ Low Basis Stock (Large Single Positions)	$___________________
___ Royalties, Patents or Copyrights	$___________________

6. Do you have any assets that you want to keep in the family? ____YES ____ NO
   (If Yes, please indicate type of asset)

   ____ Family Home, farm or other real estate

   ____ Family Business

   ____ Other Asset (describe) ____

7. Income needed to maintain desired lifestyle
   (round to the nearest $100,000) ____

8. Do you have any family members with special needs? ____YES ____ NO

   Describe:____

9. Which choice best describes your goals and objectives?

   ____ Leave as much of my estate as possible to my children

   ____ Pay the least amount of estate tax

   ____ Leave the bulk of my estate to charity

   ____ Leave a mix of my assets to family and charity

   ____ Pass specific business or property interests to my children, leaving the remainder to charity.

10. Which of the following estate planning or charitable giving techniques are you already using?

   ____ Will

   ____ Living Trust

   ____ Life Insurance Trust

   ____ Annual Gifts to Children

   ____ Business Valuation Discounts

   ____ Donor Advised Fund

   ____ Charitable Gift Annuity

   ____ Charitable Remainder Trust

   ____ Charitable Lead Trust

   ____ Dynasty Trust

   ____ Family Limited Partnership or LLC

   ____ Family Foundation