

### What Is the EstateVault™ Service?

Few individuals have taken the time to organize their financial affairs so that the administration of their estate is not a burden on their surviving spouse or the executor.

To solve that, our trusted partners at Anodos have created a process to ensure clearer, better communication around your estate.

### What's Included?

- **ESTATE BALANCE SHEET:** A detailed listing of what you own, including the "source of truth" for the existence and value of each asset/liability.
- **TRUST KEY TERMS:** Simple summary of important terms in the estate plan.
- **BENEFICIARY DESIGNATION INSTRUCTIONS:** Organizing and saving the forms naming who gets what when you're gone for the non-trust, non-probate assets you own, such as IRAs, life insurance, POD accounts, annuities, etc.
- **ESTATE TAX PRO FORMA:** Figuring out if you will owe estate taxes when you die and exploring if/how you could lower them.
- **DEED RECORDS:** Making sure your real property ownership titling is correct.
- **KEY CONTACTS:** List of contact information for important people and advisors.
- **PERSONAL PROPERTY INSTRUCTIONS:** Documenting who gets your belongings like cars, guitars, or special collections to avoid fights between beneficiaries.
- **"TREASURE MAP":** Writing down where important things are kept, such as safety deposit keys, the combination to the safe, cash grandma hid throughout the house, etc.
- **YOUR GIVING STRATEGY, GIVING FUND SUCCESSION PLANS:** Keep your beneficiaries aware of your testamentary giving plans with a copy of your NCF Giving Strategy and NCF Giving Fund succession plans.
- **LETTER TO MY FAMILY:** Many people find great meaning in drafting a letter to their family and friends expressing their joy in Christ, hopes for family, items of gratitude, favorite verses, and much more. These are often shared during life, and your EstateVault is a great place to include those special documents.

### How Does It Work?

1. First, Anodos will interview you as the EstateVault™ owner to discover all of the details needed for the orderly settlement of your estate. This includes coordinating document collection with your professional advisors (CPA, attorney, investment advisor, etc.). Anodos does not replace any of your advisors.
2. Then Anodos provides their findings and recommendations, which is critical to the eventual settlement of your estate/trust.
3. Lastly, Anodos stands ready to incorporate needed updates for your EstateVault into the future, answer questions, and be available to support your executor/successor trustee in the actual estate/trust settlement.

### Who is Involved?

The EstateVault™ owner is you, or perhaps a loved one; it is the person whose estate will need to be settled. Your surviving spouse, trustee, or executor will benefit greatly from the proactive planning work completed with you as the Vault owner. Anodos welcomes your professional advisors or others to observe as you wish too.

We work with our trusted partner, Anodos to help trustees and executors save time, reduce risk, and fulfill their fiduciary duties.



**Learn more or get started today**

Scan the QR code to learn more or call us at 949.263.0820

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