

MEMORIAL GIFTS
TREE OF LIFE



Perhaps the most difficult time in our lives comes when we have lost someone close to us – a parent, spouse, relative, friend or co-worker. Too often it is only then that we realize how much that person meant to us. Death is a time when we are struck by the reality of “remembering”.

It is in the remembering that we hold a special place in our hearts for those who have gone before us. You can honor their memory in a thoughtful and lasting way with a contribution to Shively Area Ministries.

Your tribute of \$250.00 or more supports the mission and ministry of our organization to respond to the unmet needs of the poor in the Shively area.

Recognition of your gift will be included in our newsletter and Tree of Life.

Yes, I would like to

remember a loved one
\$ _____

remember Shively Area
Ministries in my will

give a gift of stock

know more about this

Name

Address

City,State,Zip

Telephone

Please return to:

Shively Area Ministries
4415 Dixie Highway
Louisville, KY 40216
502-447-4330, ext 23

This information is not intended as legal advice. Consult an attorney when considering any legal matter.

A GIFT THAT

KEEPS ON

GIVING

**ESTATE AND PLANNED
GIVING**

Shively Area Ministries
4415 Dixie Highway
Louisville, KY 40216

(502) 447-4330

(502) 449-4176 fax

www.shivelyareaministries.com

A Will

- Prevents the state from distributing your estate *as they decide*
- Appoints your personal representative
- Can include a testamentary trust
- Names the beneficiaries *you choose*
- Appoints the guardian for your children
- Defines a financial plan for minor children
- Eliminates difficult choices for loved ones
- Continues your charitable work

Prepare Your Estate Plan and Will

Assets and Personal Property

List your assets. Make a separate list of the personal possessions you want to distribute.

People

Think about the people in your life and their needs. Decide who you want to receive your assets and your personal possessions.

Professional Advisors

Determine the professional assistance you will need – estate attorney, tax accountant, trust personnel.

Modest Estate

A Will is a very important document for a modest estate. Your instruction about the distribution of your estate eliminates the burden on others to guess your wishes. And, you loved ones will treasure the possessions you hold dear, a loving gift to them.

Select An Attorney

Seek recommendations from friends, the trust department of your bank, or the bar association.

Choose an attorney who specializes in estate planning.

Request an estimate of charges before you set the appointment with an attorney, or other advisor.

Retain counsel who meets your specific needs; one you are comfortable with. A qualified attorney will advise you about:

- Tax deductions
- Compliance with state laws
- Distributing your assets only as you wish

A Current Will or Trust

Review your document at least every five years. Have an attorney evaluate your document when you move to another state, experience a major life change, retire, your children reach adulthood, or if you have grandchildren.

You can add a bequest for SAM to your existing arrangement through a simple codicil which your attorney writes.

Once you have taken care of your family, loved ones and friends consider the powerful works of charity you can ensure through your Will.

Your Will is ...

- An opportunity to make a gift
- Permits you to create an extraordinary tribute to your spouse, parents, family friend or someone who was significant in your life.
- Ensures that SAM's work you are doing now will continue into the future

A Bequest can be ...

- Residue of your estate
- Portion of the residue
- Percentage of your estate
- Property: stock, bonds or other asset
- Fixed dollar amount

The following gifts are easy to establish. Just make SAM the beneficiary of the arrangement. You and your family will have full use of your assets. Only after your death will the property become a gift to SAM.

Other Gifts to Consider ...

- Life Insurance
- IRA
- Mutual Fund
- CD - Certificate of Deposit
- Retirement Plan residue

You Can Designate Your Gift ...

- General Purposes – allowing SAM to use your gift where it is most needed
- Specific purpose – Emergency Assistance, Food Pantry, Meals on Wheels, etc.