

Discuss your values and goals with your loved ones so that they know your plans and have a full appreciation for your decisions.




of your will. Choose someone who will be comfortable dealing with your finances and investments, taxes and record keeping. Also consider this person's availability, general health and diplomacy.

- **Guardian.** If you have minor children, name a guardian of each child in case your spouse doesn't qualify or does not survive you.
- **Agent for your durable power of attorney for finances.** Choose someone to act on your behalf in financial matters if you become unable to manage your own affairs.
- **Agent for your durable power of attorney for health care.** This person makes health care decisions on your behalf if you are unable to make them.
- **Estate planning attorney.** This person ensures that your wishes are accurately and clearly communicated through your will and legal documents.

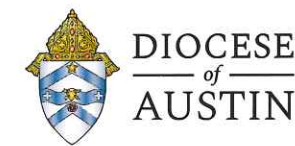
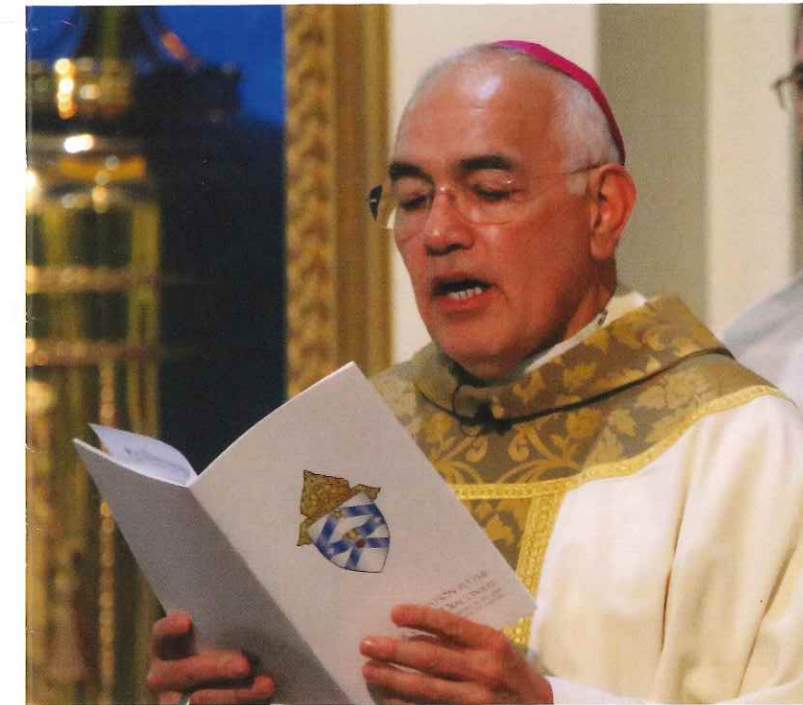
4 Step 4: Extend your legacy. Your estate plan offers an incredible charitable opportunity. You can designate our

organization as the recipient of a percentage of an item or your estate. There are tax advantages for many of the gifts and the action extends your caring nature beyond your lifetime. If you're considering remembering our organization in your will or through your estate plan, we'd be happy to meet with you to help answer any questions you may have, with no obligation.

5 Step 5: Share the good news. Ensure that any recipient of your generosity knows of your plans. This will ensure that they are aware of your intentions and will relieve undue stress in the future.

 **Congratulations!** You have taken the time to ensure that your family and favorite causes are cared for far into the future. Continually review your estate plan whenever major life changes or tax law changes occur, to make sure it's still the best plan for you and your family.


5 Steps to Protect Your Family and Your Assets



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Make a Plan That Reflects What Matters to You

Simple Steps, Big Impact

If you've put off writing your will or making plans for how your estate will be distributed after you're gone, you're not alone. Let's face it, estate planning can seem like a chore. But—like paying the bills or cleaning the house—it's a task that, once completed, feels great.

Getting started is often the hardest part, so we've put together a simple plan to help. If you keep at it, in just five steps you will have the peace of mind that comes from building a solid plan that protects you and your loved ones.

1 Step 1: Tally your assets.

The first step in creating your estate plan is taking inventory of personal data. You should include the following:

1. A list of your assets that shows current value as well as title (whether held in your name, jointly or, in certain states, as community property).
2. If you are married, a list of your spouse's assets.
3. Specifics about any debts and other liabilities.
4. A list of life insurance policies that indicates the insured, the owner and the beneficiary of each.
5. Names of your beneficiaries, including relatives and charitable organizations.
6. The location of your will, securities and other valuable papers.

2 Step 2: Make decisions about your estate plan.

Your estate plan provides a complete picture of your values and for the people and charitable causes that are important in your life. An up-to-date will serves as the foundation of your plan; asset titling and coordinating your beneficiary designations for assets such as retirement plan accounts and life insurance policies are also important.

In this step, you will list each person and nonprofit you'd like to benefit. Then you'll review your will, asset titles and beneficiary designations to determine if they mesh with your current goals.

For each recipient, include the gift or percentage you'd like each to receive. (To put a gift in your will or change the title of an asset, you may need to work with an attorney to formalize your wishes.)

3 Step 3: Pick your team.

Think about and list whom you'd like to fill these roles:

- **Executor or personal representative.** This is the person you name to carry out the terms



The simple truth:

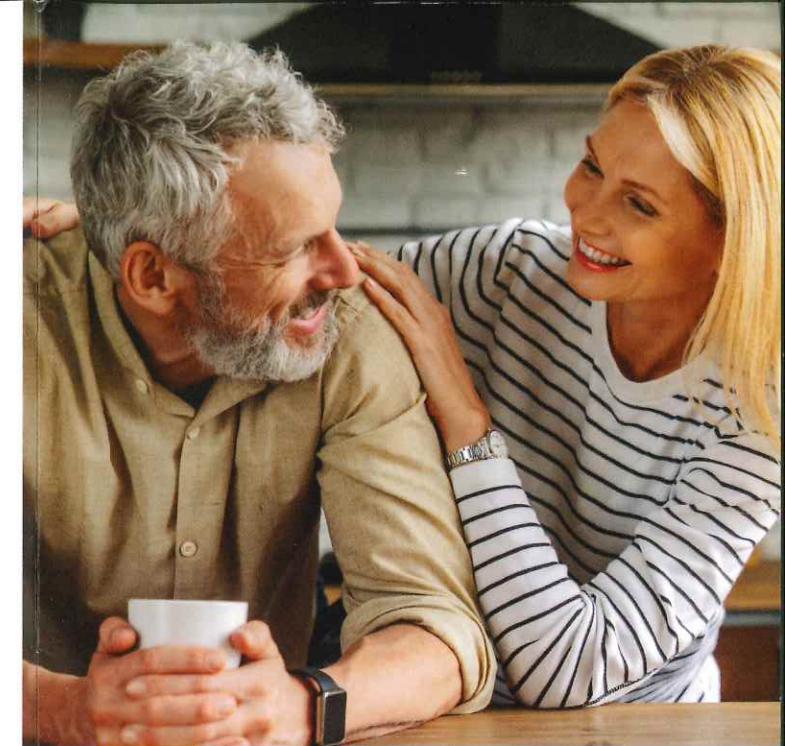
Estate planning is for everyone. It's your opportunity to express your values and effectively provide for the people and causes you cherish most.



Are You on Step 2?

Contact us to learn how you can support our mission with a gift in your long-term plans.

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The Duties of Your Executor or Personal Representative

This list can help you pick the right person for this important role. They will:

- Locate the will.
- Hire a probate lawyer, if necessary.
- Notify beneficiaries named in the will.
- Inventory all assets and have them appraised, if necessary.
- Collect all debts owed to the estate.
- Pay valid claims against the estate.
- Distribute remaining assets to your named beneficiaries.

