



Newsletter Articles

Use one per month for this quarter.

First steps lead to lasting impressions

Overcoming your fears can be the hardest part of creating a will

Many people are intimidated by the prospect of creating a will, but preparing a will is as simple as writing a letter. A well-written will is nothing more and nothing less than a statement of what is important to you. The most complicated part of preparing a will is simply taking the first step – deciding to do it.

Whether you are creating a will for the first time or revising it for the fifth time, you should use an attorney. Most attorneys charge relatively little for this service. They are experienced in writing wills and can walk you through the process. The Oklahoma United Methodist Foundation's *A Christian's Guide to Planning Your Will or Trust* can help you with the information needed for your will. Once completed, your will can benefit your family, friends, church and other charitable causes important to you.

Certain states have very specific requirements regarding wills. Many require witnesses and other formalities to make sure your will is authentic and reflects your wishes. Miss one of these requirements and your will may be invalid. If you hire an attorney who regularly drafts wills, he or she can help you with all of these basic requirements and suggest new ideas to make things even easier.

Take a moment today to consult your attorney. If you do not have an attorney, ask your friends and neighbors who they used to write their wills. You will probably spend far less than you think and receive far more peace of mind than you thought possible.

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January is Foundation Month

January marks a new year, new beginnings, and Foundation Month—a month-long awareness campaign of the Oklahoma United Methodist Foundation.

Many churches around our state already benefit significantly from permanent endowments and planned gifts put in place by faithful United Methodists.

The countless stories of mission funds, camp and college scholarships, plus funds benefiting great ministries are a small glimpse of how working through the Foundation can affect lives in our Annual Conference and around the world.

By creating an endowment fund for your church or favorite ministry, you will ensure and enrich the ministries of our Conference today and years to come. But even more importantly, you share the gift of God's Grace in Jesus Christ; a gift that will make a valuable difference in the lives of others far beyond our reach and what we could imagine.

If working through the Foundation, either as a friend of the Foundation, donor, or recipient of funds has impacted your life, we encourage you to share your story. You can encourage others to discover how they can leave a lasting legacy, ensure ministry, and change lives.

Visit the Foundation's website at www.okumf.org for more information.

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No better time than now

Many people are reluctant to write a will, or even discuss one. However, those who do are always glad they did. A well-written plan is never about life without us, it only affirms the life within us.

When we write a will, we tell the world what is important to us. A will affirms our hopes, dreams and protects our loved ones and cherished causes.

Take a moment this winter to enjoy all the season has to offer. But also let it serve as a reminder to call your attorney about writing your will, or ask if it needs updating. In the meantime, think about your values, your beliefs and the family members and charitable causes most likely to share these values with you.

The Oklahoma United Methodist Foundation is an estate and legacy planning resource. Visit their website at www.okumf.org and request your copy of *A Christian's Guide to Planning Your Will or Trust*. The guide and the online videos will help you move through the process of creating a will. Planning and providing for your loved ones can be an uplifting and positive experience. Please contact the Foundation if you have any questions or need additional information, 800-259-6863.

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Is it time to update your will?

Many significant things can happen in a year. Consider reviewing your will or estate plan every few years. Below are several life changes and other noteworthy reasons to update your will or estate plan.

1. You give birth to or adopt a child
2. Your children reach adulthood
3. You inherit or are given "new" assets
4. The needs of your beneficiaries change
5. You give away or sell assets mentioned in your current will
6. Significant change in your assets' value
7. Marriage
8. Purchase or sale of real estate
9. Relocation
10. A named beneficiary dies
11. Death, relocation, or disabled executor or trustee
12. Death of a spouse
13. Divorce
14. You wish to make a gift to your church or a United Methodist cause

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Why do I need a plan?

Failure to plan may result in accidental disinheritance. Accidental disinheritance occurs when you have no will or your will does not function properly. Because failure to plan means you risk harming those you love and subjecting your estate to needless tax, most people need to make a plan for the future.

There are several options for planning for your future. A will is a written document that permits you to state how you want your property or estate distributed, name an executor (also called a personal representative) to distribute your property, pay debts and taxes, and handle other business affairs to settle your estate. If you own property, you may wish to set up a living trust. It may be set up during life and directs where your assets go. Unlike a will, a trust will not subject your estate to probate.

Sometimes other considerations need to be made regarding your estate plan. It is important to appoint a guardian, so that if you pass away, the guardian may take physical custody of and care for your minor children or children with special needs. If you are no longer able to manage your finances or property or later wish to have someone else manage your property, a durable power of attorney will give the person you select the legal authority to buy, sell, and manage your assets. Also, a durable power of attorney for healthcare allows you to select a person who can assist your doctors in making healthcare decisions if you become unable to act on your own behalf.

The Oklahoma United Methodist Foundation's *A Christian's Guide to Planning Your Will or Trust* can help you with all of these options and more. Call the Foundation at 800-259-6863 to request your copy today.

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