



# Diocese of Dodge City

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Department of Development

We are pleased to enclose the *Parish Wills Awareness Program: Seminar Operating Manual*, which contains materials for the Office of Development to conduct Wills Awareness Seminars for your parish. These seminars are part of the Department of Development's stewardship education program and concentrate on the Christian steward's right to plan for the prayerful and orderly distribution of one's estate.

The manual contains the following materials:

On the right side of the folder -

1. Questions and Answers about Parish Wills Awareness Seminars and recommended procedures for conducting them.
2. Information to discuss at a wills awareness seminar.
3. Seminar schedule form—to be used to schedule a seminar for your parish with the Office of Development.
4. Sample Letter of Invitation—to be sent to parishioners, or selected groups of parishioners, encouraging them to attend the seminar. Alternatively, this letter can be the basis for your pastor's message in the parish bulletin.
5. Sample bulletin inserts (4).
6. Wills Awareness Survey—to be used prior to a seminar to gauge, on a no-name no threat basis, the general wills awareness of parishioners.
7. Seminar Registration form—to be used for participant sign-in at the seminar. (The Office of Planned Giving will reproduce this form for actual use at your parish seminar.)
8. Response Form—to be included in the participant's packet handed out at the seminar to evaluate the program and request additional information. (The Office of Planned Giving will reproduce this form for your parish seminar.)
9. Wills and Estate Planning Checklist—to be included in the participant's packet. (The Office of Development will reproduce this form for your parish seminar.)

On the left side of the folder, the following brochures:

1. *A Disciple's Will: remembering your family of faith*
2. *Gift Annuity*
3. *A Disciple's Guide to Planned Giving*
4. *Planned Giving with Life Insurance*
5. *The Living Trust: The powerful companion to a Disciple's Will*
6. *Durable Powers: What are they and who needs them?*

These brochures will be referred to at parish wills seminars. They are also available for your use in your parish pamphlet racks. Please call me if you would like a supply of brochures.

The purpose of these seminars is to inform Catholics in the diocese of their right to make a will to ensure that their wishes and the needs of their family are carried out as intended—which won't happen unless one makes a will and does other appropriate estate planning. At the same time, we will illustrate some gift planning techniques people can use in coordination with their estate plan to give back to God some of the material blessing He bestows on all of us. People generally recognize the importance of giving to their parish and diocesan ministries during their lifetime; not too many consider similar gifts in their estate plans and wills. Our vision is to show them the opportunities.

We are very flexible in scheduling these seminars to your convenience. You might also consider joining with other parishes in your area to have us conduct a seminar, or series of seminars, on a joint basis.

We also would be pleased to make a presentation to your parish pastoral council or stewardship commission about the particulars of a parish wills awareness seminar, or as a “dry run” of an actual seminar, if you wish.

We look forward to your scheduling a Wills Awareness Seminar for your parish. If you have any questions or comments about this material, please call me directly at 620-227-1537.

Very truly yours,

Eric Haselhorst  
Director of Development



**Office of Development**

P.O. Box 137  
Dodge City KS 67801  
(620) 227-1537

The Office of Development is offering Wills Awareness Seminars by parish invitation. The program may be scheduled at your parish's convenience and with a minimum amount of preparation required of the parish staff. Also, several parishes may hold a combined seminar. Once inaugurated, the Office of Development will offer these seminars on a continuing basis.

*What is a Wills Awareness Seminar?*

A Wills Awareness Seminar is designed to inform people of their right to make a will. A typical seminar consists of a brief and basic presentation (about an hour and half). The Office of Development presenter encourages parishioners to give prayerful thought to developing a will and estate plan that will benefit their loved ones and provide such opportunities as a final bequest or other planned gift to their parish or the Diocese of Dodge City.

*Who is the target audience?*

Studies indicate that seven out of 10 adults nationwide do not have a will. That is 70% of adults choosing not to exercise their right to distribute a lifetime of achievement.

Everyone should have a will, and therefore all of your parishioners would benefit from a Wills Awareness Seminar. A good place to start would be with estate planning are parishioners who are retired or nearing retirement. Parish groups and organizations whose members are in this age group should be especially encouraged to attend the seminar. By no means, however, should anyone be discouraged from attending.

*How do we get started?*

The Office of Development is distributing this packet of information on the Wills Awareness Seminar to each parish in the Diocese of Dodge City to encourage parishes to arrange for a seminar. If you wish a "dry run" presentation to your Parish Pastoral Council or Stewardship Commission, the Office of Development is pleased to do so.

*Support by the Office of Development*

The Office of Development is a valuable resource for parishes in educating parishioners that making a will is an important aspect of Christian stewardship. For more information about the Wills Awareness Seminar, or any other assistance, please contact:

Office Development  
Diocese of Dodge City  
PO Box 137  
Dodge City KS 67801  
TEL: (620) 227-1537  
FAX: (620) 227-1537

*Recommended procedures*

1. Have a parish organization, such as the 50 and Up Club, sponsor the seminar. This relieves the parish staff of making many of the arrangements, such as refreshments and invitations.
2. Complete and return the seminar schedule form included in these materials. The Office of Development will contact you with confirmation and final arrangements.
3. Conduct a parish survey, a sample of which is included in these materials, to determine, on a “no name” basis, how many parishioners have a will and are interested in attending a Wills Awareness Seminar.
4. Publicize the seminar. You may mail invitations (sample included); or you may prefer a series of bulletin announcements (samples included), or both. Bulletin announcements are recommended four consecutive weeks prior to the seminar. Announcements from the altar are also very helpful and encouraged. If invitations are mailed, telephone follow-up with those on the mailing list is important in stimulating interest in the seminar.

In addition, the leadership of parish groups, such as the Altar Society, Bible Study, and Knights of Columbus should be informed of the scheduled seminar so they can encourage their members to attend.

If several parishes hold a combined seminar, the host parish should coordinate this publicity with the other parishes to ensure that all involved are publicizing the seminar along these lines.

5. Encourage taking reservations in order to lend a more “business” tone to the seminar and to plan for the appropriate number of handouts provided by the Office of Development.
6. Provide a screen and possibly a microphone, depending on the size of the seminar room and anticipated attendance.
7. Recommend Seminar Program:
  - a. Pastor—Prayer and opening remarks
  - b. Sponsoring parish organization—Welcome
  - c. Director of Development—Presentation
  - d. Question and answer period
  - e. Completion of response form
  - f. Pastor—Prayer and closing
  - g. Refreshments and informal discussion

At the conclusion of the seminar, attendees will be asked to complete a response form (sample included), which will allow them the opportunity to request additional information or assistance. The Office of Development is prepared to offer ongoing support.



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What is estate planning?

How is my property owned?

What is a will?

Who needs a will?

What should a will contain?

What does “probate” mean?

What happens if there is no will?

Who should be my executor and/or trustee?

Who should be guardian for my minor children?

What are the advantages of trusts?

Will my estate owe federal and state estate taxes?

How do I give to my parish or the Diocese of Dodge City?

- Bequests
- Life insurance
- Gift annuities
- Charitable remainder trusts
- Charitable lead trusts

What is a durable power of attorney for financial matters?

What is a designation of patient advocate?

What determines the cost of writing a will?

How often should I review and update my will?

What if I move to another state?



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Yes, our parish would like to sponsor a Wills Awareness Seminar.

Our parish is interested in the following dates:

	<u>MONTH</u>	<u>DAY</u>	<u>YEAR</u>	<u>TIME</u>
1st Choice	_____	_____	_____	_____
2nd Choice	_____	_____	_____	_____
3rd Choice	_____	_____	_____	_____
<i>Example</i>	<u>5</u>	<u>17</u>	<u>2009</u>	<u>7:30 PM</u>

Parish \_\_\_\_\_

Parish Address \_\_\_\_\_

Parish Phone Number \_\_\_\_\_

Contact Person \_\_\_\_\_

Contact Person's Address \_\_\_\_\_  
(If different from parish)

Contact Person's Phone Number \_\_\_\_\_  
(If different from parish)

*Feel free to fill out the electronic form at [www.dcdiocese.org](http://www.dcdiocese.org)*

*Return to:*

Office Development  
Diocese of Dodge City  
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*Sample Letter of Invitation to  
Parish Wills Awareness Seminar*



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(DATE)

Dear Friend, (personalize if possible)

You are cordially invited to a parish seminar that could give you profound peace of mind. Each family should be represented.

Imagine creating documents that would secure the independence, lifestyle, and following matters regarding:

- Your spouse and children,
- Relationships among family members,
- Taxes and fees,
- Distribution of property, and
- Charities you want to remember.

Accordingly, our parish, working with the Office of Development in the Diocese of Dodge City, will sponsor a Wills Awareness Seminar for your information and guidance.

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

To make a reservation, please call (NAME) at (TELEPHONE NUMBER). While reservations are not required, they will assist us in planning refreshments and preparing materials to be distributed to those attending.

The seminar will be brief (about an hour and a half) without any obligation in any way. Printed information will be provided.

Please give prayerful consideration to this invitation and make plans to attend.

Sincerely,

Pastor

*Tell them to do good, to rich be rich in good works, to be generous, ready to share, thus accumulating as treasure a good foundation for the future, so as to win the life that is true life.*

1 Timothy 6:18,19



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### *What is a disciple's will?*

A disciple's will is an expression of faith. A properly drawn will is one of each person's right to create. Yet a surprising number of people — more than 60 percent — do not exercise this right. Whether you have a large or small estate, you should seek the peace of mind a properly created will delivers. You want your possessions distributed according to your wishes rather than under state law.

A disciple's will acknowledges that you understand God alone is creator and the sole and absolute owner of all things you possess. Preparing your will is your right and solemn responsibility to God, your loved ones and your Church.

(PARISH ORGANIZATION) will host a Wills Awareness Seminar in (PLACE) at (TIME AND DATE). The seminar is co-sponsored by (NAME OF PARISH) and the Diocese of Dodge City Office of Development. The office's director, Eric Haselhorst, will conduct the Wills Awareness Seminar, which will help educate you on the importance of writing or updating your will. For information, please call (PARISH CONTACT PERSON) at (PHONE NUMBER).

*As each one has received a gift, use it to serve one another  
as good stewards of God's varied grace.*

1 Peter 4:10



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*Imagine the state of Kansas making your will?*

Does this sound like peace of mind? Imagine you do not have a valid will, the laws of the state of Kansas will make one for you. State rules and regulations — not your wishes — will determine how your property will be distributed upon death, who will manage your estate, and who will care for your children. Without a will, you will have no control over your estate, and you most likely increase your estate's administration expenses and taxes.

To get you started on creating or updating your will, (PARISH ORGANIZATION) will host a Wills Awareness Seminar in (PLACE) at (TIME AND DATE). The seminar is co-sponsored by (NAME OF PARISH) and the Diocese of Dodge City Office of Development. The office's director, Eric Haselhorst, will conduct the seminar. There is no admission charge. Please call (PARISH CONTACT PERSON) at (PHONE NUMBER) so we may provide an efficient and hassle-free evening for you.

*Thus says the Lord, 'Set your house in order,'*  
2 Kings 20:1



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*Why have a will?*  
*Confused about wills?*

Why should I prepare a will? What if I have minor children? Can I write my own will?

Please join the director of planned giving for the Diocese of Dodge City, Eric Haselhorst, as he presents answers to these and other important questions at our parish's Wills Awareness Seminar. The event is co-sponsored by the Diocese of Dodge City Development office and hosted by (PARISH ORGANIZATION) in (PLACE) at (TIME AND DATE). There is no admission charge. Please call (PARISH CONTACT PERSON) at (PHONE NUMBER) so we may provide an efficient and hassle-free evening for you.

*If anyone does not provide for his own, and especially for those of his household, he has denied the faith, and is worse than an unbeliever.*

1 Timothy 5:8



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*Create a legacy...*

A properly drawn will gives you peace of mind. It is a document that will speak your mind and heart, and ensure that your wishes for your estate and loved ones are hassle free. Better yet it is your legacy.

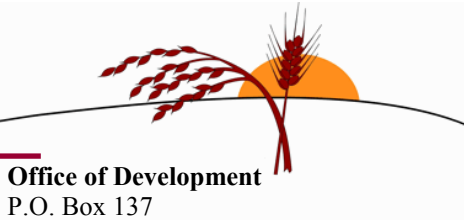
*A will allows you to:*

- Provide security for your family.
- Remember loved ones in a tangible way.
- Leave a legacy to your Church.
- Designate who will manage your estate.
- Reduce estate taxes and administration expenses.

Our parish and the Diocese of Dodge City Office of Development will co-sponsor a Wills and Awareness Seminar in (PLACE) at (TIME AND DATE). You are invited to this informative presentation by Eric Haselhorst. There is no charge. While reservations are not required, please call (PARISH CONTACT PERSON) at (PHONE NUMBER) so we may provide materials and refreshments.

*Do not lay up for yourselves treasures upon earth, ... But lay up for yourselves treasures in heaven ... For where your treasure is, there also will your heart be.*

Matthew 6:19-21



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Circle your answers.

1. Do you have a will?                      Yes                      No    *(if "no," skip to question 4.)*
2. How old is your will?    Less than 3 yrs.    3-5 yrs.    5-10 yrs.    Over 10 yrs.
3. Have you reviewed your will in the last 3 years?                      Yes                      No
4. Have you reviewed the beneficiary designations on your life insurance and other benefit plans, such as retirement plans or IRAs, within the last 3 years?    Yes                      No
5. Do you know your estimated net worth (your assets less your debts)?    Yes                      No
6. Do you have life insurance?                      Yes    No
7. Do you have children under age 18?    Yes    No
8. Your age?    21-30                      31-40                      41-50                      51-60                      Over 60
9. Are you married?    Yes    No
10. What is your gender?    Male    Female
11. Would you be interested in a Wills Awareness Seminar at our parish?    Yes    No  
*(If you answered "no" to any questions 1 through 5, you should definitely consider attending the seminar.)*
12. If yes, when is the best time for you to attend the seminar?  
Morning                      Afternoon                      Evening

13. Questions or comments:

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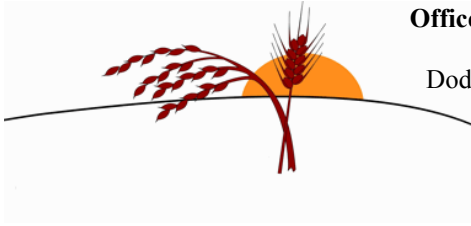
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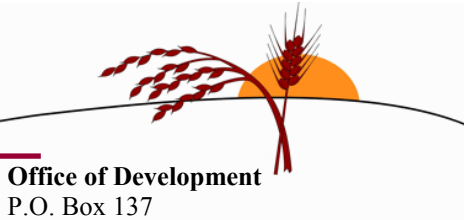
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*Registration*

Location	<i>Name</i>	<i>Address</i>	Date	<i>Telephone/Parish</i>
1			Ph. #	
2			Ph. #	
3			Ph. #	
4			Ph. #	
5			Ph. #	
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7			Ph. #	
8			Ph. #	
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10			Ph. #	
11			Ph. #	
12			Ph. #	
13			Ph. #	
14			Ph. #	
15			Ph. #	
16			Ph. #	



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Please check any of the following that you feel are appropriate for you:

- I found the presentation helpful.
- Our parish and the diocese should continue this education effort.
- I have a current will.
- I have a will that should be reviewed.
- I do not have a current will, but I am now encourage to make one.
- I would like further discussion with the Office of Development. Please call.
- I have remembered the following in my will or estate plan:

- My parish
- The Dechant Foundation in the Diocese of Dodge City
- An agency in the Diocese of Dodge City (please specify)
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- I would like more information on:
  - Charitable bequests in my will
  - Charitable gift annuities
  - Gifts of life insurance
  - Charitable remainder trusts
  - Charitable lead trusts

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ Zip \_\_\_\_\_ Telephone (\_\_\_\_) \_\_\_\_\_  
Parish \_\_\_\_\_

Comments:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Your attorney requires a great deal of factual information in order to draft a will and other documents that will best accomplish your estate planning objectives. Before meeting with your attorney to make or update your will, you should prepare a “fact sheet” covering important family and financial information. Your fact sheet will also give your personal representative and beneficiaries the information required for administering your estate efficiently. Your fact sheet should be well thought out and include the following information that applies:

\_\_\_\_\_ Name, Social Security number, birthday, birthplace and citizenship.

\_\_\_\_\_ Spouse’s name, Social Security number, birthday, birthplace and citizenship.

\_\_\_\_\_ Names, ages and addresses of children and grandchildren. Specify any from previous marriages.

\_\_\_\_\_ Residential address. If more than one, list each. Specify voting address.

\_\_\_\_\_ Date and place of current marriage. Furnish copy of any prenuptial agreement. Specify if ever resided in a community property state (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington and Wisconsin).

\_\_\_\_\_ Names of former spouses now deceased. If divorced or separated, furnish a copy of the divorce decree or separation agreement.

\_\_\_\_\_ Names, ages, addresses and nature of the relationship with intended beneficiaries (son, daughter, friend, etc.).

\_\_\_\_\_ Charitable bequests intended to parish, Diocese of Dodge City or other charities.

\_\_\_\_\_ Total bank and cash accounts (checking, savings, money market, etc.). Specify the name of the bank or financial institution, and if the account is held individually or jointly.

\_\_\_\_\_ Total investment assets (stocks, bonds, mutual funds, etc.). Specify if owned individually or jointly, the estimated fair market value and cost basis. Specify the name of the stock brokerage firm or investment advisor.

\_\_\_\_\_ Total amounts owed to you on personal loans. Specify name and address of debtor, the terms of repayment, and if the debt is secured by property (e.g., land contract on real property).

\_\_\_\_\_ Real estate owned. Specify if it is owned individually or jointly, where located, the estimated fair market value, cost basis and mortgage.

\_\_\_\_\_ Total other assets (automobiles, jewelry, collections, household goods, etc.). Specify if owned individually or jointly and the estimated fair market value.

- \_\_\_\_\_ Total debts. Specify to whom, their addresses, the terms of repayment, and if the debt is secured by property (e.g., mortgage on residence).
- \_\_\_\_\_ You and your spouse's employers' names and addresses.
- \_\_\_\_\_ You and your spouse's pension, profit-sharing, IRAs or other retirement plans, stock purchase plans, stock option, employment contracts or other employment benefits. Specify the value of the employment plans, the beneficiary named on the plans and contact person at the employers.
- \_\_\_\_\_ Life insurance policies insuring you or your spouse. Specify the insured, the face amount, cash surrender value, who owns the policies, the beneficiary, and the name and address of your insurance agent.
- \_\_\_\_\_ Life insurance policies you own on the life of someone other than you or your spouse.
- \_\_\_\_\_ Any trusts you or your spouse have established. Specify if you are the beneficiary of a trust established by someone else, or if you have a power of appointment under a will or trust. Furnish copies of documents.
- \_\_\_\_\_ Prepaid funeral and burial arrangements.
- \_\_\_\_\_ Intentions by you or your spouse to donate body organs or to be cremated.
- \_\_\_\_\_ Personal representative for your estate, the guardian of your minor children, conservator of your children's assets, trustee of your trust, agent for your durable power of attorney for financial and property matters, patient advocate for your health and medical matters. Also specify the successors to these positions.
- \_\_\_\_\_ Location of copies of income tax returns and any gift tax returns, and name and address of your accountant or tax return preparer.
- \_\_\_\_\_ Location of important papers (birth, baptism, marriage and death certificates; military discharge papers; insurance policies; passports; property deeds; etc.). Specify bank name and address of any safe deposit box.

Update your fact sheet regularly; a good time is each year when you collect your income tax information. Be sure to date each update and furnish copies to your attorney, your spouse, personal representative, trustee or others who may need to know this information.

Please direct any questions you may have about this checklist to:

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[www.dcdiocese.org](http://www.dcdiocese.org)



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Type of Gift	Form of Gift	Benefit to Diocese/Parish	Benefit to You
Outright Gift	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stocks/securities</li> <li>• Real estate</li> <li>• Insurance</li> </ul>	<ul style="list-style-type: none"> <li>• Perpetual income</li> <li>• Interest income used by parishes, school and organizations in the Church</li> </ul>	<ul style="list-style-type: none"> <li>• Income tax deduction</li> <li>• No capital gains tax on appreciated gifts</li> </ul>
Bequest	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Real estate</li> <li>• Personal property</li> <li>• Percentage of estate</li> <li>• Remainder of estate</li> </ul>	<ul style="list-style-type: none"> <li>• Bequest will be help in perpetuity and invested to fund Church needs as designated by the donor</li> </ul>	<ul style="list-style-type: none"> <li>• Possible estate tax deduction</li> <li>• Opportunity to make a perpetual gift</li> </ul>
Charitable Gift Annuities	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stocks/securities</li> <li>• Real estate</li> </ul>	<ul style="list-style-type: none"> <li>• Upon the death of the donor or last surviving annuitant, remaining assets generate income for the Church</li> </ul>	<ul style="list-style-type: none"> <li>• Guaranteed fixed income for life</li> <li>• Portion of income is tax-free</li> <li>• Income tax deduction</li> <li>• Reduction of estate taxes</li> </ul>
Insurance Policies	<ul style="list-style-type: none"> <li>• Name The Ann and Virgil Dechant Foundation of the Church in Southwest Kansas as policy owner and/or beneficiary</li> </ul>	<ul style="list-style-type: none"> <li>• The Dechant Foundation receives full face value of policy upon death of the donor, or may receive current surrender value prior to the donor's death</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunity to make substantial future gift to Church at current manageable cost</li> <li>• Income tax deduction for value of the policy when transferred</li> <li>• Premium payments may be deducted as gifts</li> </ul>
Charitable Remainder Trusts	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stocks/securities</li> <li>• Real estate</li> </ul>	<ul style="list-style-type: none"> <li>• Income for duration of trust helps Church meet spiritual and human needs that exceed the capabilities of most parishes, schools and organizations</li> </ul>	<ul style="list-style-type: none"> <li>• At end of trust period, principal returns to donor or heirs</li> <li>• Principal can pass to others with little or no shrinkage</li> <li>• Tax deduction</li> </ul>
Retirement Plan/IRA	<ul style="list-style-type: none"> <li>• Name the Dechant Foundation as beneficiary of death benefit</li> </ul>	<ul style="list-style-type: none"> <li>• Significant gift upon death of donor</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunity to make a major gift</li> <li>• Estate and income tax savings</li> </ul>

RESPONSE FORM

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Zip \_\_\_\_\_ Telephone (\_\_\_\_) \_\_\_\_\_

Parish \_\_\_\_\_

Please check any of the following that you feel are appropriate for you:

- \_\_\_\_\_ The presentation was helpful to me.
- \_\_\_\_\_ Our parish and the diocese should continue this education effort.
- \_\_\_\_\_ I have a current Will.
- \_\_\_\_\_ I do not have a current Will, but am now encouraged to make one.
- \_\_\_\_\_ I would like further discussion with the Office of Planned Giving. Please call.
- \_\_\_\_\_ I have remembered the following in my Will:
  - \_\_\_\_\_ My parish
  - \_\_\_\_\_ The Dechant Foundation for the Catholic Church in Southwest Kansas.
  - \_\_\_\_\_ A ministry in the Diocese of Dodge City (please specify).

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- \_\_\_\_\_ I would like more information in the following brochures:
  - \_\_\_\_\_ *A Disciple's Will: remembering your family of faith*
  - \_\_\_\_\_ *The living Trust: The powerful companion to a Disciple's Will*
  - \_\_\_\_\_ *Durable Powers: What are they and who needs them?*
  - \_\_\_\_\_ *Gift Annuity*
  - \_\_\_\_\_ *Planned Giving with Life Insurance*
  - \_\_\_\_\_ *A Disciple's Guide to Planned Giving*

Comments:

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