



UUCville ♥ Building community through love in action.



PLANNED GIVING

Leaving a Legacy

LEGACY BUILDER



Your Personal Estate Record Book



Estate Record Book

Scan to Download
An Interactive PDF

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Crafting Your Plan

Your book can serve as a final set of directions to help ease loved ones' minds, prevent disputes and begin the process of settling your estate. All of this helps bring comfort to your family, and clarity to the legacy you wish to leave behind.

As you progress with your planning, your attorney should counsel you on all aspects as well as draft all legal documents. **This material is intended for educational purposes only and should not be construed as legal or tax advice. For specific legal or tax matters, please consult with a qualified professional.** We would be happy to assist you with your charitable intentions to UUCville, whether at the beginning of your planning process or after you've completed your records.

Your Record Book...

- Gives you space to list the important details of your life
- Allows you the chance to provide direction for family immediately following your passing
- Provides an opportunity to outline your full estate
- Lets you list which charities will benefit from your estate



Good to Know

If you're married or partnered, you and your significant other should prepare separate record books. While some sections contain shared information, most sections are distinctly personal. Plus, it makes it easier for loved ones to manage your unique affairs over time. For additional copies of this record book, please contact us.

A Note About Names

In order to be fully comprehensive, we suggest including all aliases for each person listed throughout this record book. This could be a maiden name, former name or preferred name.

Personal Info

You and Your Family

Full name (Please print above and include all aliases.)

Address

City, State ZIP

Phone

Email

Social Security number

Date of birth

Birthplace

Spouse/Partner Information

Current spouse or partner's full name

Date of birth

Address

City, State ZIP

Phone

Email

Social Security number

Date of marriage (if applicable)

Location of certificate (if applicable)

Location of prenuptial agreement document (if applicable)

Date of death (if applicable)

Resting place

Location of death certificate

Former spouse or partner's full name

Date of marriage (if applicable)

Location of certificate (if applicable)

Location of prenuptial agreement document (if applicable)

Date of divorce, annulment, legal separation or death (Specify event.)

Location of documents pertaining to divorce, annulment, legal separation or death (Specify event.)

Your Children and Grandchildren

Child's full name	Date of birth
Address	City, State ZIP
Phone	Email

Child's full name	Date of birth
Address	City, State ZIP
Phone	Email

Child's full name	Date of birth
Address	City, State ZIP
Phone	Email

Child's full name	Date of birth
Address	City, State ZIP
Phone	Email

Child's full name	Date of birth
Address	City, State ZIP
Phone	Email

Child's full name	Date of birth
Address	City, State ZIP
Phone	Email

Child's full name	Date of birth
Address	City, State ZIP
Phone	Email

Child's full name	Date of birth
Address	City, State ZIP
Phone	Email

Child's full name	Date of birth
Address	City, State ZIP
Phone	Email

Child's full name	Date of birth
Address	City, State ZIP
Phone	Email

Your Children and Grandchildren

Grandchild's full name	Date of birth
Address	City, State ZIP
Phone	Email

Grandchild's full name	Date of birth
Address	City, State ZIP
Phone	Email

Grandchild's full name	Date of birth
Address	City, State ZIP
Phone	Email

Grandchild's full name	Date of birth
Address	City, State ZIP
Phone	Email

Grandchild's full name	Date of birth
Address	City, State ZIP
Phone	Email

Grandchild's full name	Date of birth
Address	City, State ZIP
Phone	Email

Grandchild's full name	Date of birth
Address	City, State ZIP
Phone	Email

Grandchild's full name	Date of birth
Address	City, State ZIP
Phone	Email

Grandchild's full name	Date of birth
Address	City, State ZIP
Phone	Email

Grandchild's full name	Date of birth
Address	City, State ZIP
Phone	Email

Family History

Parent 1 full name	
Address	Phone
Email	
Date of death (if applicable)	Resting place
Location of death certificate	

Parent 2 full name	
Address	Phone
Email	
Date of death (if applicable)	Resting place
Location of death certificate	

Sibling's full name	
Address	Phone
Phone	Email

Sibling's full name	
Address	
Phone	Email

Sibling's full name	
Address	
Phone	Email

Other Loved Ones

Full Name/relationship	Phone
Email	

Full Name/relationship	Phone
Email	

Full Name/relationship	Phone
Email	

Full Name/relationship	Phone
Email	

Your Pets

Pet's name/type of animal/breed	Microchip/license number
Food/medical/other care	

Pet's name/type of animal/breed	Microchip/license number
Food/medical/other care	

Pet's name/type of animal/breed	Microchip/license number
Food/medical/other care	

Veterinarian's contact information	
Pet caretaker's name	Pets they will care for
Phone	Email
Address	

Your Medical Information

Emergency Contacts

Name/relationship	Phone
-------------------	-------

Email	
-------	--

Name/relationship	Phone
-------------------	-------

Email	
-------	--

Name/relationship	Phone
-------------------	-------

Email	
-------	--

Medical Professionals

Primary physician	Phone
-------------------	-------

Medical office affiliation and address	
--	--

Dentist	Phone
---------	-------

Address	
---------	--

Specialist (include specialty.)	Phone
---------------------------------	-------

Address	
---------	--

Specialist (include specialty.)	Phone
---------------------------------	-------

Address	
---------	--

Specialist (include specialty.)	Phone
---------------------------------	-------

Address	
---------	--

Specialist (include specialty.)	Phone
---------------------------------	-------

Address	
---------	--

Employment Information

Current Employment

Are you retired?

☐ Yes

☐ No

Company name

Phone

Address

Supervisor

Current benefits and location of documents

Position Ownership

interest

☐ Yes

☐ No

Start date (and end date, if retired)

Prior Employment

Previous employer company name and position

From

To

Address

Phone

Life insurance or retirement benefits that remain effective

Benefits and location of documents

Previous employer company name and position

From

To

Address

Phone

Life insurance or retirement benefits that remain effective

Benefits and location of documents

Military Service

Branch of service and rank

From

To

Service number (if applicable)

Discharge papers location

Service-connected disability and income

Military pension or other benefits

Honors and achievements

Charitable Affiliations

Full Name of Organization	Method of Involvement (donor, volunteer, etc.)

Your Finances

Income Sources (may include Social Security, retirement plans, pensions or securities)	Amount of Annual Income
	\$
	\$
	\$
	\$
	\$
	\$
	\$

Income Tax Records

Location	Tax advisor
Address	Phone

Safe-deposit Box or Safe

Location/address	
Box number	Location of key/combination
Location/address	
Box number	Location of key/combination

Passwords and Digital Instructions

Cell phone unlock code

Computer password

Account Type

User Names

Passwords or Location of Passwords

Did You Know?

While you can include instructions on how your family should handle your digital estate data in your will, it's more complicated than you may think. Some states require you to name a digital executor to handle those materials after your lifetime. Please reach out to a qualified lawyer for personalized guidance on digital estate planning – it's a step towards peace of mind for you and your loved ones!

Website Address of Account	User Name	Password or Location of Password
Website Address of Account	User Name	Password or Location of Password
Website Address of Account	User Name	Password or Location of Password
Website Address of Account	User Name	Password or Location of Password
Website Address of Account	User Name	Password or Location of Password
Website Address of Account	User Name	Password or Location of Password
Website Address of Account	User Name	Password or Location of Password
Website Address of Account	User Name	Password or Location of Password
Website Address of Account	User Name	Password or Location of Password
Website Address of Account	User Name	Password or Location of Password
Website Address of Account	User Name	Password or Location of Password

Passwords and Digital Instructions

Helpful Information

Gas company	Phone	Account number
Electric company	Phone	Account number
Water company	Phone	Account number
Phone company	Phone	Account number
Waste management	Phone	Account number
Internet provider	Phone	Account number
Cable/satellite company	Phone	Account number
Home security company	Phone	Account number
House cleaning service	Phone	Account number
Yard maintenance	Phone	Account number

Other Obligations (mortgage, insurance company, etc.)

Calculate Your Estate's Net Worth

What Is Your Estate Really Worth?

Your estate's value from an estate planning viewpoint is different from your net worth, which is a snapshot of what you own and what you owe.

Fortunately, most people find they have much more in their estate than they thought when they account for savings, employer and personal life insurance, retirement plan benefits and perhaps even a future inheritance. An inventory of your assets and liabilities will help you determine what you can leave to loved ones and charitable organizations after your lifetime and how to best provide for the distribution of your estate.

Make an Inventory of Your Assets

How you title your property is an important part of any estate plan. Be sure to identify how your property

is held—if it is owned by you individually, jointly with a spouse or partner or as community property. Learn more about how property can be owned in the gray box below.

Use the current market value for everything you own and the face value (not cash value) for any life insurance. Don't strive for exact amounts; round numbers will do.

Make Property Decisions

Once you've made an inventory of your property, you're ready to decide where you want it to go. The following pages can help you organize your plans.

Once the worksheets are complete, you are ready to meet with your attorney.



How to Tell “Mine” From “Ours”

To determine whether or not you can pass all or part of an asset by your will, you should know its form of title. There are three ways property can be owned jointly.

1. **Jointly owned property** with rights of survivorship generally goes to the surviving joint owner, regardless of what the will states.
2. **Tenants-in-common** is also a form of joint ownership where two or more individuals own the property. The main difference is that one half of the property will follow the provisions in your will; therefore, your beneficiary will become the new co-owner after your lifetime with your original tenant-in-common.
3. **Community property** is also a form of co-ownership, but is applicable only between spouses. Some states allow married couples to take title in this manner. When property is held this way, each spouse owns a half interest in the asset.

Your Assets

1. Cash (savings, money market and checking accounts, CDs)

Type of account	Financial institution	Owned by you alone	Owned by your partner	Owned jointly or community
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

2. Real Estate

Description and location of property	Date of purchase	Cost basis	Owned by you alone	Owned by your partner	Owned jointly or community
_____	_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____	\$ _____

3. Retirement Benefits (pension, profit sharing, IRAs, Keogh plans, etc., including face amounts of life insurance owned in the retirement plan)

Description	Beneficiary	Owned by you alone	Owned by your partner
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

Your Assets

4. Brokerage Accounts

Firm name	Amount
	\$
	\$
	\$
	\$

5. Personal Assets (automobiles, jewelry, furniture, boats, paintings, collections, etc.)

Description	Date of purchase	Owned by you alone	Owned by your partner	Owned jointly or community
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$

6. Life Insurance

Face amount (note any policy loans)

Name of company	Insured	Beneficiary	Owned by you alone	Owned by your partner	Owned jointly or community
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$

7. Annuities

Present value

Description	Annuitant	Beneficiary	Cost basis	Owned by you alone	Owned by partner	Owned jointly your or community
			\$	\$	\$	\$
			\$	\$	\$	\$
			\$	\$	\$	\$

Your Assets

8. Business Interests Owned (proprietorship, partnership, corporation)

Value of interest

Business name and address	Cost basis	Owned by you alone	Owned by partner	Owned jointly your or community
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$

9. Obligations Due to Me (mortgages held, notes receivable, accounts receivable)

Name of debtor	Address	Owned by you alone	Owned by partner	Owned jointly your or community
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$

10. Other Assets Potentially Includable in Estate

(interest in a trust or estate, royalties, patents, copyrights, etc.)

Current value

Description	Cost basis	Owned by you alone	Owned by partner	Owned jointly your or community
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$

Total of all assets: \$ \$ \$

Your Liabilities (approximate balances owed)

1. Mortgages

Description of property	Name of creditor	Owed by you alone	Owed by your partner	Owed jointly or community
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

2. Loans, Installment Debts (bank, auto and personal loans, insurance loans, etc.)

Description	Name of creditor	Owed by you alone	Owed by your partner	Owed jointly or community
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

3. Current Bills (department store and other charges, credit cards, etc.)

Description	Name of creditor	Owed by you alone	Owed by your partner	Owed jointly or community
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

Your Liabilities (approximate balances owed)

4. All Other Liabilities

[illegible]

Congratulations! You've just conquered an important milestone: understanding your estate.

Now, read on to decide how you'd like to distribute your assets. You hold the power to leave a legacy of support for loved ones and cherished causes.

Estate Planning Documents

Your Will

Location

Date of will

Date of last review

Date(s) of any codicils

Executor or personal representative

Address

Phone

Alternate personal representative

Address

Phone

Estate planning attorney

Address

Phone

Revocable Living Trusts

Location

Date of trust

Date of last review

Trustee

Phone

Email

Successor trustee

Phone

Email

Beneficiary(ies)

Financial Power of Attorney

Have you signed a financial power of attorney? ☐ Yes ☐ No

Document title

Date prepared

Prepared by (name, title, contact information)

Name of person appointed to act on your behalf/phone number/email address

Names of alternates to act on your behalf/phone number/email address

Effective date of power holder to act: ☐ Immediately ☐ Upon your incapacity ☐ Other

Location of original document

Location of copies

Additional notes

Health Care Directives

Do you have a health care power of attorney? ☐ Yes ☐ No

Document title

Date prepared

Prepared by (name, title, contact information)

Effective date for power holder to act: ☐ Immediately ☐ Upon your incapacity ☐ Other

Location of original document

Location of copies (we suggest attaching a copy to this record book)

Health Care Directives *continued*

Do you have an advance health care directive or living will? ☐ Yes ☐ No

Document title

Date prepared

Prepared by (name, title, contact information)

Location of original document

Locations of copies (We suggest attaching a copy to this record book.)

Long-Term Care

Do you have a long-term care insurance policy? ☐ Yes ☐ No

Insurance agent's name/phone number/email address

Company name

Policy number

Body, Organ and Tissue Donations

Do you wish to donate your body, organs or tissues? ☐ Yes ☐ No

First donation (identify organ or tissue, or indicate entire body)

Receiving organization's name/phone number/email address

Location of documents

*** *Please note: This is not intended as a legal form.
Consult with your doctor and attorney today to
create the appropriate documents.***

End-of-Life Planning

Funeral Arrangements

You have a preference. That's why it is not unusual for you to plan funeral arrangements now. The information below can help provide emotional support for your family and loved ones, giving them instructions they know you have already approved.

Funeral home and/or church

Address

Type of service

☐

Religious

☐

Fraternal

☐

Military

☐

Memorial service with no casket present

Funeral instructions

☐

Closed casket

☐

Open casket

☐

Other: _____

Instructions

I direct that my body be used for these medical purposes

Grave site information

Location

Arrangements made by

Phone

Favorite hymns/songs

Favorite scripture/poems/quotes

Favorite flowers

Charity(ies) in lieu of flowers (see *page 9* for charitable organizations I support)

Persons to Notify in the Event of My Death

Name/relationship

Phone

Address

Name/relationship

Phone

Address

Name/relationship

Phone

Address

Charitable Organizations Included in My Estate Plan

Full Name of Organization

Address

Other Matters That May Need Family Attention

Here's a checklist of actions to be completed in the period of time between your death and up to a year after. Check all applicable boxes.

☐ **Contact the attorney to have the will read** and to see what has to be done in regard to estate settlement.

The beneficiary can choose to take proceeds in a lump sum or spread them out as payments over the years.

☐ **Contact the Social Security Administration.** Social Security pays a lump sum death benefit. A surviving spouse can get survivor's benefits as early as age 60. If a surviving spouse is disabled, they may get benefits even earlier. Minor children may also be entitled to survivor's benefits when a parent dies.

☐ **Contact companies holding retirement plans.** There may be money left in them to be paid out to survivors. Like life insurance, proceeds can be paid in a lump sum or in installments.

☐ **Call the Veterans Administration (VA).** A surviving spouse and dependent children may be entitled to a small pension if the deceased was a veteran. The VA will pay partial burial expenses and provide a headstone or marker as well as an American flag to drape over the casket, without charge. If the burial is in a national cemetery, the VA will provide a grave site and pay burial costs.

☐ **Consult with the health insurance company.** If illness is determined to be the cause of death, the insurance company may cover some of the associated expenses. Future premiums may also be less if the policy has covered two or more people and now there will be one less person covered. Some health insurance policies are also combination policies that provide some death benefits.

☐ **Contact former employers for benefits resulting from that employment.** Refer to employment history section (Page 8).

☐ **Notify organizations where the deceased held memberships.** Some offer memorial services. They may have life insurance and may return part of dues paid. Organizations/phone numbers/emails:

☐ **Collect life insurance policies and call the companies and ask for death claim forms.**

Disposition of Estate

Who Gets What

Now that you've determined which assets comprise your estate and their values, you need to indicate who you want to inherit your assets.

1. Gifts to spouse/partner (indicate a contingent beneficiary in case your spouse/partner does not survive you)

Description of asset or percentage of estate	Name/relationship/address

2. To other beneficiaries

Description of asset or percentage of estate	Name of beneficiary/relationship/address

3. To charitable organizations

Name and address of charitable organization	Percentage of net estate	Dollar amount
	% OR \$	
	% OR \$	
	% OR \$	
	% OR \$	

Name and address of charitable organization	Description of specific asset

Who Gets What

4. Balance or residue of estate

Name and address of charitable organization	Percent of residuary estate
	_____ %
	_____ %
	_____ %
	_____ %

Name and address of other beneficiaries	Percent of residuary estate
	_____ %
	_____ %
	_____ %
	_____ %

How Your Estate Plan Can Benefit Your Favorite Causes

Once you have completed this record book, you are ready to meet with your attorney and other professional advisors for their important counsel and the drafting of necessary documents.

We hope that as part of your planning you consider making a gift to us in your will or through some other form of gift planning. A gift to us, however, should never come before your personal or family needs. That’s the beauty of a planned gift—you come first. Depending on the type of gift you choose, you may potentially reap

benefits from your philanthropy that have very practical and desirable outcomes, such as the following:

- Ability to leave a legacy
- Income tax benefits
- A life income
- Personal satisfaction
- Reduce or eliminate capital gains taxes

Whatever your objective, we can help match your needs with the right giving tool to provide the most benefits for you, your family and us.

Please contact us if you have questions about giving to UUCville

Stewardship

CARING • SHARING • GIVING

Stewardship Steering Committee
SSC@uucharlottesville.org



717 Rugby Road • Charlottesville, VA 22903
434-293-8179
info@uucharlottesville.org uucharlottesville.org



*The information presented in this document was accurate as of the publication date (2025).
This material is intended for educational purposes only and should not be construed as legal or
tax advice. For specific legal or tax matters, please consult with a qualified professional.*