



The Virginia United Methodist Foundation  
10330 Staples Mill Road  
Glen Allen, VA 23060  
[www.VAUMFGifts.org](http://www.VAUMFGifts.org)  
[foundation@vaumc.org](mailto:foundation@vaumc.org)  
804.521.1121 or 1-800-768-6040 ext. 121

## THE MAKING OF A WILL

The making of a Will requires advanced preparation if you are going to meet your personal needs and objectives. The Foundation's PERSONAL INFORMATION RECORD BOOKLET can be a real asset in compiling and recording important information needed to prepare your Will. Listed below are six steps to help in the process:

1. Write down your objectives and make a list of those things that are important to you: family, friends, church, school, charitable causes, etc.
2. Make a list of who is important to you. This list may include family and cherished friends. List each one separate and consider their individual needs.
3. Do the same for institutions, programs, and organizations that have been important to you during your lifetime.
4. Prepare a list of your assets. This list should include home and furnishings, cars, bank accounts, investments, business interests, jointly owned property, life insurance, pension funds, IRA's and all other property.
5. Make an appointment with your attorney to have your Will prepared.
6. Before going to the attorney's office write down names, birth dates, social security numbers, addresses, and who you want to be your personal representative.

## TYPES OF BEQUESTS

Bequests can take many forms. When considering a bequest to a charitable organization, we suggest that you acquaint yourself with the various options.

**PERCENTAGE BEQUEST** – With this type of arrangement you may designate that a charitable organization receive a specific amount expressed in terms of a percent.

**SPECIFIC BEQUEST** – a specific bequest allows you to designate a specific dollar amount or a specific piece of property. Securities, real estate and other tangible personal property come under the heading of property.

*Learn more about these services by contacting The Virginia United Methodist Foundation in Glen Allen, VA at 804-521-1121 or 1-800-768-6040, ext.121, or email [foundation@vaumc.org](mailto:foundation@vaumc.org). We are available to visit with local church committees, to present seminars on endowment and planned giving and/or to consult with donors in creating a comprehensive estate design with charitable intent.*



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CONTINGENT BEQUEST – You may specify that a bequest be made to a charitable institution under a certain condition, such as the death of another beneficiary.

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