

Steps to Complete Your Will

1. Determine your personal goals and outline your objectives, inventory your property and major assets, estimate any mortgages and personal debts, and prepare a list of family members and other beneficiaries to whom you want to pass assets. You'll also want to ask yourself these two questions:

- How do I want to divide my assets among my family members, other loved ones and favorite causes?
- Do I need to make special provisions for any of my heirs?

2. If you have minor children or an adult child, a parent, or a spouse with special needs who is your dependent, you must think about who will care for them when you're gone. Choose a guardian and secondary guardian and talk to them ahead of time about what you are asking and understand that if you don't name a guardian, the courts may end up doing it for you.

3. Choose a person you trust to be named as the executor (the person or institution that will carry out your instructions in your will). The Executor undertakes many important responsibilities, including:

- Notifying all interested parties and agencies of your death.
- Taking care of the disposition of your remains.
- Performing the fiduciary responsibilities of your estate (paying bills, taxes, etc.).
- Distributing your assets according to your will.
- Working with the courts and attorneys to resolve any unsettled matters.

*If you don't have a will, or if your will doesn't name an executor, the courts will appoint one.

4. Choose what to give to The Hearts Center from the following options:

- A specific bequest gives us a particular piece of property. If you disposed of the property before your death, we won't receive your intended gift because we cannot claim any other property.
- A general bequest gives us a stated sum of money. If there is insufficient cash in your estate to cover the bequest, other assets will be sold for cash to honor your wishes for us.
- A residuary bequest means giving the "rest, residue or remainder" of your estate, or, more commonly, a percentage of the residue after all other bequests, debts and taxes have been paid.
- A contingent bequest requires a certain event to occur before the gift can happen. For example, you could bequeath funds to a family member provided that person survives you; if not, the funds would then go to The Hearts Center.

5. You can tailor how you would like The Hearts Center to use your gift.

- An unrestricted bequest allows us to use the assets in the most beneficial way.

- A restricted bequest allows you to specify how we are to use the funds. Your funds could go to publishing books, supporting youth activities or expanding outreach. Contact us in advance to be certain your intent can be fulfilled.
- An endowed bequest allows you to restrict the principal of your gift so we can use only a small portion each year, typically allowing the fund to last forever.

The official bequest language for The Hearts Center is:

I give _____ (residue, percentage, or specific amount) to The Hearts Center Inc., having its principle office at 130 N. 2nd Street, Livingston, MT, for the general purpose of sharing the ascended masters' love-wisdom teachings throughout the Earth.

6. Meet with an Estate Planning Attorney

Seek the counsel of an estate planning attorney to achieve the highest outcome for your heirs and to help make your estate plans the best they can be. Even if you think your will requirements are simple, there are likely rules of construction and formalities required that are particular to your state. Make sure that your final documents are legally valid and executable. Also consider where you will safe keep the documents so that they will be readily available and make sure your heirs and executor know where to locate them. They can also be placed in safe deposit boxes or with your attorney.

7. Let us know your plans.

Please contact friends@heartscenter.org or call 630-894-441 to let us know when you have made plans for such a gift. We would love the opportunity to thank you for your generous act. We are happy to honor your wishes regarding anonymity.