

Our Congregation's
End-of-Life Stewardship Survey
Please Complete One Survey per Family

End-of-Life Planning

The following statement is **most true** about my/our goals for my/our estate: (circle one)

- a. The top goal for my/our estate is to take care of me/us and any minor children.
- b. The top goal for my/our estate is to take care of me/us and then to pass as much along to my children/heirs as possible.
- c. The top goal for my/our estate is to leave a meaningful gift for my/our children/heirs and include something for charity.
- d. The top goal for my/our estate is to leave as much as possible for charity.

Will/Living Trust

- Do you have a Will or Living Trust? (If no, skip to next section) Yes No
- Approximately when was it created? _____
- Has it been created, updated or reviewed in the past 5 years? Yes No
- Does it include our congregation? Yes No
- Does it include other ELCA affiliated ministries? Yes No
- Does it include other charities (not affiliated with our church)? Yes No
- If it does not include charity, would you consider adding charity? Yes No Maybe

Other Charitable Gifts (outside of your Will/Living Trust)

- Have you included any charitable gifts through your Life Insurance or Retirement Accounts? Yes No
- Have you included any charitable gifts through a charitable gift annuity or charitable trust? Yes No

No Will or Living Trust

- If you do not have a Will or Living Trust, how soon do you intend to create one? 1yr 5yr Never
- Would you consider adding charity? Yes No Maybe
- How much do you feel you know about Wills and estate planning/ current tax laws effecting your estate? Nothing A Little A Lot

Please Include Added Comments, Suggestions or Questions Below, (Additional Space on Back Side).