Suggestions for Organizing a Wills Seminar

Bequests under Wills can be a most gratifying part of a parish stewardship program. So consumed are we with regular weekly givings that we often forget the other occasions in our lives when we might make larger and thoughtful gifts.

Your Will will be your instruction to your executor for the care of your family, and other things that were important to you in your lifetime.

Your congregation may be interested in knowing more about supporting activities through bequests. A good way to reach a larger number of people is to suggest a seminar.

1. Allow about 2 hours on an evening or Saturday morning. The seminar should last about one to one and one half hours. Provide coffee to encourage participants to mingle and discuss the presentation on an informal basis.

2. Appoint a seminar leader who is knowledgeable about wills and estate planning - e.g. a lawyer, accountant, financial planner, insurance, trust company representative. Participants should be advised to contact their own professional advisors.

NOTE: The Seminar leader should understand that the event should not be used to promote products or solicit business.

3. The following, in question format, are the key topics which should be covered:

*Why should I have a will?
*Do I still need a will if my assets are held jointly with my spouse?
*What happens if I die without a will?
*What do executors do?
*Who should I choose for my executor(s)?
*How are executors paid for administering my estate?
*What about guardians for my children?
*What kinds of gifts can I make? (For example - general, specific, contingent, subject to a trust).
*What are the tax rules on death?

*How are charitable donations made in my will treated under those tax rules?
*What about beneficiary designations outside of my will?
*Is it expensive to make a will?
*Can I make a will on my own?
*What will it cost to administer my estate? E.g. probate/executors fees, taxes
*Should I have power of attorney for my property and my personal care?
(A power of attorney for personal care is sometimes called a "living will")

4. Invite any participants who are interested in planned giving to identify themselves so you can provide them with the name of a contact with additional information about planned giving.

5. Promote the presentation in your church, in other churches in your area, and the local community.

For more information, contact Kevin Smith, Regional Gift Planning Consultant for Newfoundland and Labrador, Anglican Church of Canada at 709 739-5667 or by Email: K_smith@nf.sympatico.ca.