

Let us  
HELP YOU  
—prepare—  
FOR YOUR  
future!



OREGON CONFERENCE OF  
SEVENTH-DAY ADVENTISTS

Planned Giving & Trust Services

19800 Oatfield Rd | Gladstone, OR 97027  
[www.OregonAdventist.org](http://www.OregonAdventist.org)



# Estate PLANNING Guide

Are you planning for the future?



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of Seventh-day Adventists

PLANNED GIVING  
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# What DO I need TO know ABOUT ESTATE Planning?

## THE ESTATE: WHAT YOU OWN

Your estate consists of everything you own. Throughout life we earn income and collect assets that serve to meet our needs. For many it's significant to recognize God's ownership by supporting His cause and caring for the needs of others.

As we grow older, our attention turns toward providing for retirement and finally to distributing any remaining assets to the people and causes we care about after we are gone.

## THE PLAN:

WHAT YOU DO WITH WHAT YOU OWN.

Your estate plan provides a roadmap for what you wish to do with your estate both during your life and after it. It also can include your wishes regarding those most important to you. Your estate plan is an essential part of both financial and retirement planning.

## DECISIONS, DECISIONS:

WHO WILL MAKE YOURS?

You may not always be able to manage your own affairs or make decisions on your own behalf. If so, who would you trust to make decisions for you? Utilize the tools available to make your wishes known.

## DURABLE POWER OF ATTORNEY

This document is used to appoint someone to act in your behalf regarding business/financial affairs. It can be effective immediately or upon physical or mental incapacity.

## ADVANCE DIRECTIVE

This document spells out health care instructions for your medical providers so they can treat you as you desire.

## HEALTH CARE POWER OF ATTORNEY

This document allows you to name a person to direct your health care if you are unable to do so.



## ESTATE PLANNING CHECKLIST

- ☐ Meet with an estate planning consultant
- ☐ Make a will
- ☐ Consider a trust
- ☐ Make provision for minor children
- ☐ Decide on a power of attorney
- ☐ Obtain an advance directive
- ☐ Consider life insurance
- ☐ Store your documents safely
- ☐ Tell your loved ones how to access them

We can help you check the boxes!  
If you haven't completed your estate plan,  
contact us to set up an appointment.

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### Planned Giving & Trust Services

503-850-3570  
1-800-233-2727

WillPlan.org  
OregonAdventist.org

