



Georgia Baptist
Foundation

Seven Step Estate Stewarding Planner



You may already be aware of the incredible impact a biblical estate plan can have on supporting a ministry well beyond one's lifetime. But did you know just how simple and easy it is to create a biblical estate plan?

This planner will strategically equip you to create a biblical estate plan. Once you have completed the guide, your attorney can do the rest.

At the bottom of this document you will find additional resources to help you more easily fulfill these steps.



1 Pray and ask the Lord for direction on how He wants you to use your estate for His Kingdom's work.

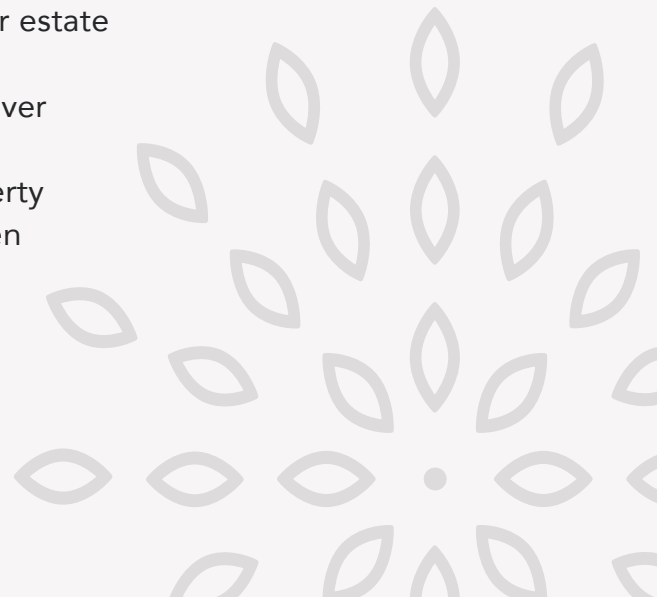
2 Gather personal data and any existing wills or trust agreements.

In addition to basic contact information, you will also need to include your occupation(s), marital status, number of marriages, your current church name and city, and your citizenship along with a few other details.

Note: Please ensure that you are prepared to list all of your children's names and ages, including children from any previous marriages or your spouse's previous marriages, regardless of whether or not they will be named in your estate.

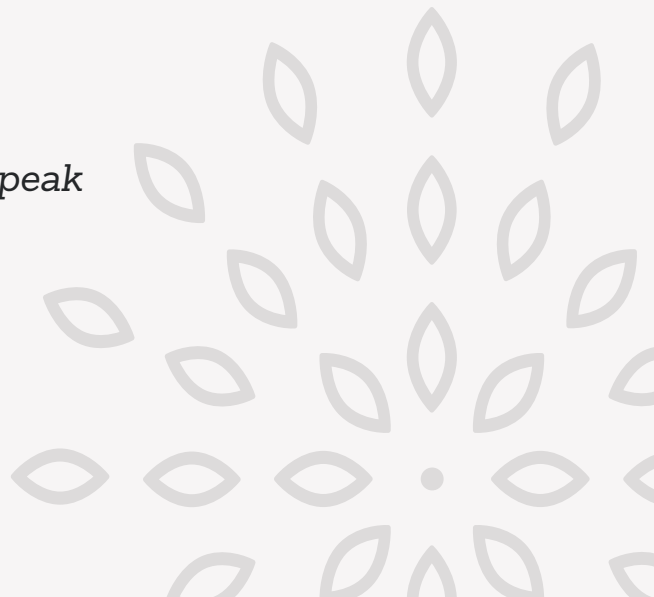
3 Consider who you will designate (after your spouse) to:

- ▶ Distribute the assets you own
- ▶ Have power of attorney over your estate
- ▶ Living will/health care surrogate
- ▶ Have physical custody and care over your minor children
- ▶ Manage and distribute any property received in trust for minor children



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- 4 Determining how much is *enough* for your family.
 - 5 Consider what God is leading you to do for Kingdom impact.
 - 6 Make a list of all your assets, including their value, any debt, and ownership.
 - 7 Schedule an Estate Stewarding Consultation meeting with a GBF staff member.

With these completed, you are ready to speak with your attorney and make it official.



Every gift, no matter the size, can further the work of the church or ministry that aligns with your passion for decades to come.

The Georgia Baptist Foundation is a trust agency of the Georgia Baptist Mission Board. It is our mission to assist Georgia Baptists to be good stewards of God's blessings. We promote Gospel transformation through bequests, planned gifts and trusts, as well as provide financial fund management solutions for Georgia Baptist churches and ministries.

To learn more, or if you would like assistance with your biblical estate plan or planned gift, please contact the Georgia Baptist Foundation and one of our Estate Stewardship professionals will be happy to assist you in any way without cost or obligation.



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[Suggested Bequest Terminology](#) ▶

[Estate Planning Worksheet](#) ▶

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