

Creating an Estate Plan Is Essential

While this brochure encourages estate giving to Unity of Walnut Creek, its most important goal is to encourage you to create or update your estate plan if needed.

It's never too late to create one, and there is always a reason to have one – no matter how much money or assets you have. It's not just about who or what to give money to when you die!

Your estate plan determines:

- What medical decisions are made and who makes them when it matters most
- If your estate avoids probate
- Who gets your possessions
- Guardianship of minor children
- The amount of support you give to the causes and organizations that are important to you

It's important that your wishes and needs are known, and that they are documented properly under the appropriate state law – or others may be making decisions for you.

Estate plans, when done properly, can also shield your loved ones from some of the emotional and financial burden of losing you to incapacitation or death.

While not necessarily easy or comfortable to do, estate planning is essential. We send you ease and comfort as you prepare these important plans.



1871 Geary Road
Walnut Creek, CA 94597
(925) 937-2191

www.unityofwalnutcreek.org

Unity of Walnut Creek Legacy Giving Program



Don't judge each day by the harvest you reap but by the seeds that you plant.
~Robert Louis Stevenson



Unity of Walnut Creek has been transforming lives and radiating love since 1948. The loving generosity of many people over the years has ensured our spiritual home has always had the means to keep the lights on and the love flowing.

Leaving a gift to Unity of Walnut Creek in your estate plan can help ensure our ministry continues to provide positive, practical spiritual teachings to help the next generation live healthy, prosperous and meaningful lives.

You can give in many ways and as general support or for a specific purpose. In all instances, your gift will help lay a foundation of financial stability that will serve people who live after your lifetime – a legacy of love.

Thank you, with deep appreciation, for your support of Unity of Walnut Creek and for helping to create a world where all know their divine nature and intrinsic worth.

Top Seven Things You Can Do to Leave a Legacy

1. Prepare a will or trust.

Only 50% of those who pass on have one. Without a will, you may lose control over your belongings.

2. Leave a gift in your will or trust for the nonprofit and charitable organizations that

made a difference in your life. Less than 6% of American households have included nonprofits in an estate plan.



3. Consider donating assets

for your charitable gift. These include, but aren't limited to, stocks, bonds, CDs, real estate, vehicles, art

and jewelry. Such gifts may even provide tax incentives.

Unity reserves the right to decide which tangible property to accept.

4. Remember loved ones with memorial gifts.

5. Name a nonprofit of your choice as the beneficiary of your pension plan or IRA.

6. Purchase a new life insurance policy naming your favorite nonprofit as the beneficiary.

7. Name your favorite nonprofit as the beneficiary of an existing life insurance policy.

There Are Many Ways to Gift

Gifts Anyone Can Make

- Gifts from Your Will or Trust (Bequests)
- Retirement Plan/IRA: Lifetime Gifts, Distributions
- Stocks and Appreciated Securities
- Real Estate
- Life Insurance: Lifetime Gifts, Estate Distributions
- Tangible Personal Property
- Business Interests, Closely Held Stock, Partnership
- Donor Advised Funds

Gifts That Pay You Income

- Charitable Gift Annuities: Immediate, Deferred, Flexible
- Charitable Remainder Trusts: Annuity, Unitrusts
- Charitable Lead Trusts
- Flip Unitrusts
- Pooled Income Trusts

Each of these have different impacts to you; consult an Estate Planning Attorney or Financial Advisor for how they would apply to your situation.