

Making Your Legacy

Many people pass away without having a last will and testament. Approximately 65% of Americans do not have a will or trust.

State and federal laws provide good incentives for the preparation of a will. Good documents make clear your personal wishes about things like child custody, property and asset distribution, and charitable bequests. A will or trust serves to actually minimize costs related to settling an estate and can help avoid family disagreements.

This information is not intended as tax, legal or financial advice. Consult your personal financial advisor for information specific to your situation.



For More Information

I would like to speak with someone who can provide additional information on writing a will.

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

Parish _____

Please complete and return to the address listed below. All inquiries are treated with complete confidentiality.

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Steward Your Legacy: By Planning Your Will or Trust




The Catholic Foundation
of the DIOCESE of SACRAMENTO, INC.



Creating A Will

The absence of a will can have a devastating impact on an estate. Here is a look at what constitutes a valid will.

- ▶ A will must be signed by a person of legal age. In most states this is age 18.
- ▶ The document must be the product of a person with full capacity to state his or her will.
- ▶ The document must have been created with full intent of taking effect at death.
- ▶ A will must be signed free of fraud, undue influence, duress or coercion.
- ▶ Most states require that the will be signed in front of witnesses.

These simple steps are all that is required to constitute a valid will. It is recommended that individuals consult their attorneys to guard against anything that might delay the processing of an estate. Your will is your opportunity to carefully articulate your wishes, your values and your legacy.

For more information on planning your will and trust, call (916) 733-0257.

Four Reasons Americans Avoid Preparing a Will

1 Too Little Property To Merit A Will

Many people look around and feel their estate is small and does not warrant a will.

Headlines always highlight multi-million dollar estates. The truth is that many people die possessing much more than they realize. What may be a modest home or a small investment portfolio today can enjoy significant growth in value before death. Where no will exists, the state will determine distribution.

2 Life Gets In The Way

Sometimes we fail to prepare a will because “life just gets in the way,” and we let day-to-day routines prohibit us from considering a will. Some do not care to plan for death, or rationalize that “no one can know the future,” thinking so much could change between today and when we die. What good could it do to plan today?

3 A Will Is Costly

A carefully prepared will does have costs, especially with complicated or larger estates. However, the trade off pales in comparison to not having a will. Without a will an estate may face the maximum in probate costs and taxes. A family disagreement may cause legal costs to skyrocket. In some cases, heirs can actually end up bearing the brunt of out-of-pocket costs. Having a will can save you and your family money.

4 Distaste For Legal Documents

Some people don't like legal documents that can be long and difficult to understand. However, a will is much simpler than the legal intricacies that an estate without a will may experience. Attorneys will gladly provide an easy to understand summary of the contents of a will to ensure that your objectives are met.