



Annual Conference is coming in a few weeks. The Kentucky United Methodist Foundation booth will be stocked with a lot of useful materials for your church or agency.

**Take a look at this list →**

While the list may seem a bit daunting to compile, if you have ever served as the executor for a loved one's estate, or talked with a relative who has, you know the benefit of recording this information ahead of time - while your loved one can still help you.

The Foundation has a booklet for you and your congregational members that can be used for organizing and recording this information in one place. Many pastors and seniors have said, "This is just what I needed."

Adult children of an aging parent say, "I have been working with my Mom/Dad little by little to make sense of these things. The Foundation's booklet made it a lot easier."



**See you at the KUMF booth!**

# Before You Leave... The 25 Estate Documents You Need To Put In One Place

## The Essentials

- Will
- Letter of Instruction
- Trust Documents

## Marriage and Divorce

- Marriage License
- Divorce Papers

## Life Insurance and Retirement

- Life-Insurance Policies
- Individual Retirement Accounts
- 401(k) Accounts
- Pension Documents
- Annuity Contracts

## Bank Accounts

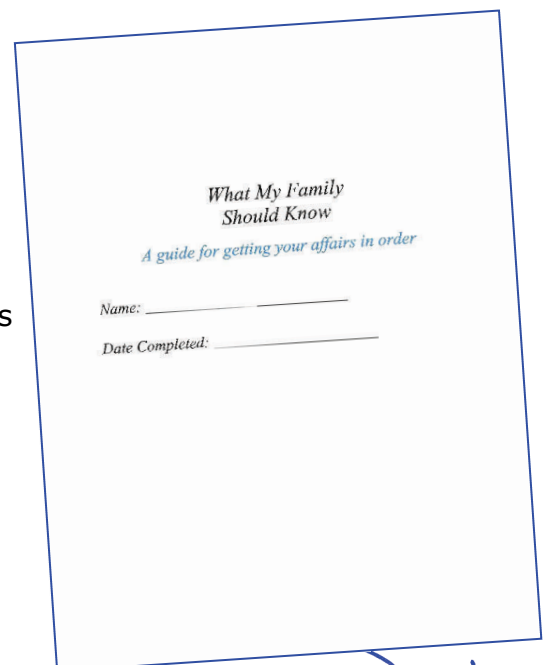
- List of Bank Accounts
- List of User-Names and Passwords
- List of Safe-Deposit Boxes

## Health-Care

- Personal and Family Medical History
- Durable Health-Care Power of Attorney
- Authorization to Release Health-Care Information
- Living Will
- Do-Not-Resuscitate Order

## Proof of Ownership

- Housing, Land and Cemetery Deeds
- Escrow Mortgage Accounts
- Proof of Loans Made and Debts Owed
- Vehicle Titles
- Stock Certificates, Savings Bonds, and Brokerage Accounts
- Partnership/Corporate Operating Agreements
- Tax Returns



*David*

**Top Ten Reasons to Visit the K.U.M.F. Booth at Annual Conference**

If you have no seminars at your church about planned giving or endowments, and if you hear no sermons at your church about stewardship beyond your life-time, chances are that your church probably does not receive any planned gifts or endowments.

If you would like to change that, come by the KUMF Booth to talk with us about ways in which the Foundation can help strengthen the ministries at your church.

The Foundation can partner with you to:

**1 Give workshops to your church on charitable giving.**

**2 Help your finance team develop a permanent endowment committee.**

**3 Lead a seminar on Wills and Estate Planning for your congregation.**

**4 Transfer a gift of stock for the benefit of your church.**

**5 Work with a congregant to make a bequest for your church.**

**6 Offer investment options for church endowments, trusts, and reserve funds.**

**7 Help members give to your church beyond their own lifetimes.**

**8 Show pastors how to encourage legacy gifts.**

**9 Provide Charitable Gift Annuity proposals for church members.**

**10 Help church members include your church in their estate plans.**

Let's talk about your church's vision for serving the needs in your community and bringing a life-changing message to our world. **See you at the KUMF Booth!**

- Bowing Green District**  
State Street
- Frankfort District**  
Frankfort First
- Lexington District**  
Centenary  
Aldersgate Camp
- Louisville District**  
Fourth Avenue  
Wesley Manor

**On The Road**

E'town Memorial UMC  
Permanent Endowments  
Thursday, April 25

Southern Hills UMC  
How KUMF Serves the Church  
Monday, May 13

Paris First UMC  
Endowing Effective Ministries  
Thursday, May 15

**Save these 2013 dates:**

**Investment Committee**

Tuesday, May 14, 10 a.m.  
E-town Memorial UMC  
Tuesday, August 13, 10 a.m.  
E-town Memorial UMC  
Tuesday, November 12, 10 a.m.  
Conference Call

**August Committee Meetings**

**Finance Committee**  
E-town Memorial UMC  
TBA

**Nominating Committee**  
Conference Call  
TBA

**Executive Committee**  
TBA  
E-town Memorial UMC

*All times are E.T. unless noted*

What do these churches, agencies and districts all have in common? They have each recently made additions to their funds managed by KUMF.



If you don't see your name give us a call today to schedule a workshop, presentation or committee meeting.