

Ready to create your legacy?

At the Washington County Community Foundation, we encourage everyone to have a current, legally valid will.

A will allows you, not the law, to decide how your assets are distributed, who will carry out your wishes, and which people and causes become part of your legacy.

The WCCF can help you explore charitable giving opportunities as part of your estate plan.



*The WCCF Team is
Here to Help You Achieve
Your Charitable Goals*



WASHINGTON COUNTY
COMMUNITY
FOUNDATION



**Contact us to learn how a bequest
or other planned gift can support
the causes you care about and
make a lasting difference for
generations to come.**

 www.wccf.net
 info@wccf.net
 **724-222-6330**

This material is provided for informational purposes only and should not be considered legal, tax, or financial advice. Donors should consult with their financial advisor, tax professional, or legal counsel regarding their specific situation before making any charitable or financial decisions.

The Washington County Community Foundation is a 501(c)(3) publicly-supported charitable corporation. The official registration and financial information of the Foundation may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.

Estate Planning with the WCCF

*Helping You Give . . .
Close to Home*



Your Estate Planning Checklist

Getting Started

- Make a list of your assets and financial accounts
- Make a list of your debts and liabilities
- Identify important personal documents and where they are stored
- Decide who you want to benefit from your estate
- Consider the people and causes that matter most to you

Create or Update Your Will

- Create a legally valid will
- Name an executor/personal representative
- Name guardians for minor children, if applicable
- Specify how you want your property and assets distributed
- Consider including a charitable gift in your will
- Review your will after major life events

Consider Other Planning Documents

- Establish a financial power of attorney
- Establish a health care power of attorney
- Complete an advance health care directive/living will
- Review beneficiary designations on retirement accounts and life insurance
- Consider whether a trust may be appropriate for your circumstances

Plan for Your Legacy

- Identify charitable organizations or causes you want to support
- Consider whether you would like to leave a percentage of your estate to charity
- Learn about the PA Giving Pledge
- Explore charitable giving options with the Washington County Community Foundation
- Consider establishing a fund or making a bequest through the WCCF
- Share your charitable intentions with your family and trusted advisors

Keep Your Plan Current

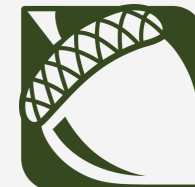
- Review your estate plan every few years
- Update your plan after marriage, divorce, birth, death, or other major life changes
- Review beneficiary designations regularly
- Make sure your executor and loved ones know where important documents are located
- Keep copies of your documents in a secure but accessible location
- Tell your family or trusted representatives about your wishes



Planning Today for Tomorrow

Your Estate Planning Team May Include:

- **Attorney -**
Helps prepare your will and other legal documents
- **Financial Advisor -**
Helps coordinate your estate plan with your financial goals
- **Tax Advisor/CPA -**
Helps you understand potential tax considerations
- **Insurance Professional -**
Reviews life insurance and beneficiary designations
- **Community Foundation -**
Helps you explore ways to include charitable giving in your estate plan



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