

Jesuits West Province

# Provide & Protect

A Guide to Planning  
Your Will and Trust



**JESUITS**  
West

[www.jesuitsgiving.org](http://www.jesuitsgiving.org)

[www.jesuitswest.org](http://www.jesuitswest.org)

Jesuits West  
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Dear Friends of the Jesuits,

This planning guide is provided as a service to those preparing their estate plan. It can help organize assets and priorities prior to visiting with an attorney or estate planner. In this way, it will help protect assets for your loved ones while ensuring your final wishes.

For nearly 500 years, Jesuits enjoyed a special partnership with lay men and women. You have worked alongside us, volunteered in our ministries, and provided generous financial support, enabling us to carry out our much-needed work spreading God's word, educating leaders instilled with Ignatian values, and giving voice to the voiceless.

As our work continues and as the need for it grows in our ever-changing world, we want to invite you to become a member of the Ignatian Heritage Society (IHS), a group of donors who have partnered with us by including us in their wills or estate plans.

As a member of the IHS program, you will receive:

- A handsome St. Ignatius Medallion, commissioned by Jesuits West
- Invitation to an annual regional appreciation luncheon
- Updates and news about the Jesuits in our Provinces
- A copy of the book *Provide & Protect*, an in depth estate planning tool (not this planning guide)
- Recognition on the Jesuit West website (optional)

In addition to the above-mentioned ministries, your support benefits the retired and infirm Jesuits who reside at the Sacred Heart Jesuit Center in Los Gatos as well as supports the education and training of future Jesuits who will carry on the traditions of Jesuit education and service.

Our IHS program represents a tangible opportunity for the Jesuits to thank those during their lifetime who have remembered the Society in their estate plans. If you have already done so, please let us know so we can enroll you in our IHS program. If you would like to include us in your estate plan, please contact Fr. Sam Bellino, S.J., Director of Legacy Planning at (408) 884-1639.

Sincerely in Christ,



Rev. Scott R. Santarosa, SJ  
Provincial



Rev. Samuel P. Bellino, SJ  
Director of Legacy Giving

Ad Maiorem Dei Gloriam

# I. You & Your Family

**Please tell us about you and your family.** Print names in ink, not pencil.  
Spell names exactly as you want them to appear in your estate documents.  
Use full legal names, not nicknames.

## YOUR PERSONAL INFORMATION

Date \_\_\_\_\_

Your Full Legal Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Gender:  Male  Female

**Present marital status:**

Married  Single  Divorced  Legally Separated  Widowed

If you are widowed, what date did this occur? \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Employer \_\_\_\_\_

Job Title \_\_\_\_\_ Work Phone ( ) \_\_\_\_\_

**Are you a U.S. Citizen?**

No  Born in the U.S.  Naturalized

**Check which documents you presently have:**

Will

Living Will

Living Trust

Durable Power of Attorney/Health Care

Durable Power of Attorney/Finances

## Your Spouse

Spouse's Full Legal Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Gender:  Male  Female

### Have you previously been married?

Yes  No

If you are widowed, what date did this occur? \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Employer \_\_\_\_\_

Job Title \_\_\_\_\_ Work Phone ( ) \_\_\_\_\_

### Is your spouse a U.S. Citizen?

No  Born in the U.S.  Naturalized

### Check which documents your Spouse presently has:

- Will
- Living Will
- Living Trust
- Durable Power of Attorney/Health Care
- Durable Power of Attorney/Finances

### Do you or your spouse have a Prenuptial agreement that identifies and disposes of separate spousal property? (If yes, attach a copy.)

Yes  No

## Religious Affiliation

Religious Organization \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

## Your Children

Please list *all* children, whether minors or adults, *including deceased children and children of a prior marriage*. If you need more space, attach additional pages. If you wish to exclude a child as a beneficiary of your estate, check the "Exclude" box. If you have no children, write "NONE."

**1. Full Legal Name** \_\_\_\_\_

Date of Birth \_\_\_\_\_ Social Security # \_\_\_\_\_

### Marital Status

Married  Single  Needs Special Care  Dependent  Exclude

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### Origin

Child of Present Marriage  Child of Prior Marriage  Deceased

**2. Full Legal Name** \_\_\_\_\_

Date of Birth \_\_\_\_\_ Social Security # \_\_\_\_\_

### Marital Status

Married  Single  Needs Special Care  Dependent  Exclude

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### Origin

Child of Present Marriage  Child of Prior Marriage  Deceased

**3. Full Legal Name** \_\_\_\_\_

Date of Birth \_\_\_\_\_ Social Security # \_\_\_\_\_

### Marital Status

Married  Single  Needs Special Care  Dependent  Exclude

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### Origin

Child of Present Marriage  Child of Prior Marriage  Deceased

## II. Your Contacts & Healthcare

### YOUR EXECUTOR

Your executor is the manager of your estate. Because he or she will make many decisions about the management and distribution of your estate, you should select a trusted person who understands your circumstances. An executor will usually complete eight separate steps to ensure an orderly transfer of all of your property to the right individuals.

1. Submit your will to the probate court
2. Locate your heirs
3. Determine your estate assets and values
4. Pay bills and the estate attorney
5. Make debt payments
6. Resolve any estate controversies
7. File your income and estate tax returns
8. Distribute your assets to heirs

Please name your executor and alternate executor.

Executor \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Relationship, if not a spouse \_\_\_\_\_

### Your Alternate Executor

In case the person above is unable to serve, please name an Alternate Executor.

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Relationship \_\_\_\_\_

## YOUR GUARDIAN FOR MINOR CHILDREN

Guardian \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Relationship, if not a spouse \_\_\_\_\_

### Your Alternate Guardian

Guardian \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Relationship \_\_\_\_\_

## YOUR HEALTHCARE REPRESENTATIVE

### Power of Attorney For Healthcare

Healthcare Power of Attorney \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Relationship, if not a spouse \_\_\_\_\_

### Alternate Power of Attorney for Healthcare

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Relationship, if not a spouse \_\_\_\_\_

# III. Your Finances

Please list all of your assets and liabilities. This will help your advisor plan your estate. Most people learn at the end of this exercise that they are worth more than they think!

Asset	\$ Total Value of Asset	Check if Joint Property	Check if Husband's Property	Check if Wife's Property
Example Property	\$298,000		✓	
<b>Real Estate</b>				
Main Residence Address				
Second Residence Address				
Vacation Home				
<b>Checking Accounts</b>				
Bank, Account Number				
<b>Savings Accounts/ CDs/ Money Market Funds/Credit Union Accounts</b>				
Bank, Account Number				
Tax Sheltered Annuity— not in Retirement Plan				

Asset	\$ Total Value of Asset	Check if Joint Property	Check if Husband's Property	Check if Wife's Property
<b>Investments</b>				
Bonds or Bond Fund Custodian, Account Number				
Stocks or Stock Fund Custodian, Account Number				
Saving Bonds				
<b>Personal Property</b>				
Furniture/Household Furnishings				
Tools & Equipment				
Antiques/Collections				
Jewelry				
Automobiles/Vehicles				
Business Interests				
Life Insurance— Face Amount/Death Benefit				
Retirement (IRA/401(k)/403(b)) Custodian, Account Number				
Miscellaneous				
<b>Total Assets: \$</b>				



# IV. Your Estate Plan

## 1. SIMPLE WILL – MARRIED COUPLE

### First Estate – Specific Bequests, Balance to Spouse

Bequests of items or amounts to family or to charities.

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____

### Bequests of Percentage of First Estate to Family or Charities, Balance to Spouse

PERCENT	RECIPIENT, CITY AND STATE
1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____

## 2. SIMPLE WILL – SINGLE/SURVIVING SPOUSE

### Specific Bequests

Bequests of items or amounts to family or to charity.

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____

### Residue of Estate

Percent of residue to family or to charity.

PERCENT	RECIPIENT, CITY AND STATE
1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____

### 3. WILL WITH TRUST FOR CHILDREN – MARRIED COUPLE

#### Specific Bequests, Balance to Spouse

Bequests of items or amounts to family or to charities.

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____

#### Bequests of Percentage of First Estate to Family or Charities, Balance to Spouse

PERCENT	RECIPIENT, CITY AND STATE
1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____

### 4. WILL WITH TRUST FOR CHILDREN – SINGLE/SURVIVING SPOUSE

#### Specific Bequests

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____

#### Name, City and State of Trustee

Primary Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Relationship, if not a spouse \_\_\_\_\_

Age for ending trust and distributing principal to children \_\_\_\_\_

## 5. "GIVE IT TWICE" TRUST FOR FAMILY – MARRIED COUPLE

A married couple with an estate below the Federal exemption amount may desire a simple will. The first estate may include specific bequests to children or charity with the balance transferred outright to the surviving spouse.

### First Estate – Specific Bequests, Balance to Spouse

Bequests of items or amounts to family or to charities.

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

### Bequests of Percentage of First Estate to Family or Charities, Balance to Spouse

PERCENT	RECIPIENT, CITY AND STATE
1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____
4. _____ % to	_____

## 6. "GIVE IT TWICE" TRUST FOR FAMILY – SINGLE/SURVIVING SPOUSE

### Specific Bequests

Bequests of items or amounts to family or to charities.

ITEM OR AMOUNT	RECIPIENT, CITY AND STATE
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

## Residue of Second Estate

Percentage of residue to family or to charities.

PERCENT	RECIPIENT, CITY AND STATE
1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____
4. _____ % to	_____

Another popular option for the estate of a surviving spouse is to divide the second estate into two parts. The first portion of the estate is given to the children when you pass away. The other part is transferred to a “Give It Twice” Trust. This is a charitable remainder unitrust that pays 5% each year to children for 20 years (5% times 20 years equals 100% — or you may select 6% for 18 years). After paying income to children for 20 years, the trust corpus is given to favorite charities. If you select this option, please choose the portion outright and the part in the “Give It Twice” Trust (the total of the two percentages will equal 100%).

Outright to Children \_\_\_\_\_%    To “Give It Twice” Trust \_\_\_\_\_%

## Children In Trust

Children to receive trust income — % Share, Legal Name, City and State

1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____
4. _____ % to	_____

## Charities at the End of The Trust

Charities to receive trust remainder — % Share, Legal Name, City and State

1. _____ % to	_____
2. _____ % to	_____
3. _____ % to	_____
4. _____ % to	_____

# Bequest Language

One way for you to support the Society of Jesus is to make a bequest. A bequest is a gift made to the Jesuits in your will or trust. One significant benefit of making a gift by bequest is that it allows you to continue to use the property you will leave to charity during your life. Another benefit is that by making a bequest you are able to leave a lasting legacy. On July 1, 2017, the California and Oregon Jesuit Provinces became the *USA West Province, Society of Jesus* (Jesuits West).

In order to make a bequest, you should speak with your attorney. Your attorney can help you include a bequest to Jesuits West in your estate plan. We have provided some basic bequest language to assist you and your attorney.

## 1. Outright Bequest

If you are considering making an outright bequest to Jesuits West, we recommend the following language:

### Bequest of a Specific Dollar Amount

**I hereby give, devise and bequeath \$ \_\_\_\_\_ to Jesuits West, a non-profit organization located at P.O. Box 68, Los Gatos, CA 95031-0068, Federal Tax ID #94-1156486, for Jesuits West general use and purpose.**

### Bequest of Specific Personal Property

**I hereby give, devise and bequeath DESCRIPTION OF PROPERTY to Jesuits West, a non-profit organization located at P.O. Box 68, Los Gatos, CA 95031-0068, Federal Tax ID #94-1156486, for Jesuits West general use and purposes.**

### Bequest of Specific Real Estate

**I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at ADDRESS OR DESCRIPTION OF PROPERTY to Jesuits West, a non-profit organization located at P.O. Box 68, Los Gatos, CA 95031-0068, Federal Tax ID #94-1156486, for Jesuits West general use and purposes.**

## 2. Restricted Bequest

If you are considering a bequest but would like to ensure that your bequest will be used only for a specific purpose, please let us know. We would be happy to work with you and your attorney to help you identify ways to give that will ensure your charitable objectives can be met. We will also work with you and your attorney to craft language to accomplish your objectives.

In cases where donors are making a restricted bequest, we recommend that your attorney include the following provision to give the Jesuits flexibility should it no longer be possible for Jesuits West to use your gift as you originally intended:

**If, in the judgment of the Provincial and his advisors of Jesuits West, it shall become impossible for Jesuits West to use this bequest to accomplish the specific purposes of this bequest, Jesuits West may use the income and principal of this gift for such purpose or purposes as the Provincial determines is most closely related to the restricted purpose of my bequest.**

### Disclosure on Attorneys and Jesuits West

*Thank you for completing this form. It is offered by us to you as an educational service. While we attempt to provide helpful estate and financial background, we are not able to offer specific legal advice on your personal situation. Because you may have special needs, we know that you will want to contact your own attorney. He or she will be your independent advisor and will have an obligation of trust and confidence to you. With the advice of your independent attorney, you may have a customized estate plan that truly fulfills your unique family, healthcare, estate and planning circumstances.*

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