

# Provide & Protect

A Guide to Planning Your Will and Trust



CLEMSON<sup>®</sup>  
Forever  
PLANNED GIFTS

**This guide is meant to be used as a planning tool for your convenience in working with your advisers. We appreciate any consideration of the Clemson University Foundation in your future plans. Please call Clemson's Office of Gift and Estate Planning at 864-656-0663 if we can be of assistance to you and your family.**

## 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 \_\_\_\_\_

Preferred Phone ( ) \_\_\_\_\_ Email \_\_\_\_\_

Employer \_\_\_\_\_

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

**Are you a U.S. Citizen or Lawful Permanent Resident?**

No  Born in the U.S  Naturalized  LPR

**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 To Whom? \_\_\_\_\_

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

Preferred Phone ( ) \_\_\_\_\_ Email \_\_\_\_\_

Employer \_\_\_\_\_

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

**Is your spouse a U.S. Citizen or Lawful Permanent Resident?**

No  Born in the U.S  Naturalized  LPR

**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 & Health Care

### YOUR EXECUTOR/PERSONAL REPRESENTATIVE

Your executor/personal representative 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. A executor/personal representative 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/personal representative.

Executor \_\_\_\_\_

Address \_\_\_\_\_

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

Preferred Phone ( ) \_\_\_\_\_ Email \_\_\_\_\_

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

### Your Alternate Personal Representative

In case the person above is unable to serve, please name an alternate personal representative.

Name \_\_\_\_\_

Address \_\_\_\_\_

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

Preferred Phone ( ) \_\_\_\_\_ Email \_\_\_\_\_

Relationship \_\_\_\_\_

## YOUR GUARDIAN FOR MINOR CHILDREN

Guardian \_\_\_\_\_

Address \_\_\_\_\_

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

Preferred Phone ( ) \_\_\_\_\_ Email \_\_\_\_\_

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

### Your Alternate Guardian

Guardian \_\_\_\_\_

Address \_\_\_\_\_

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

Preferred Phone ( ) \_\_\_\_\_ Email \_\_\_\_\_

Relationship \_\_\_\_\_

## YOUR HEALTHCARE REPRESENTATIVE

### Power of Attorney For Healthcare

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

Address \_\_\_\_\_

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

Preferred Phone ( ) \_\_\_\_\_ Email \_\_\_\_\_

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

### Alternate Power of Attorney for Healthcare

Name \_\_\_\_\_

Address \_\_\_\_\_

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

Preferred Phone ( ) \_\_\_\_\_ Email \_\_\_\_\_

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

### III. Your Finances

Please list all of your assets and liabilities. This will help your adviser 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>				



Liabilities	\$ Total Amount of Debt	Check if Joint Debt	Check if Husband's Debt	Check if Wife's Debt
Mortgage on Personal Residence				
Mortgage on Second Residence				
Mortgage on Vacation Home				
Vehicle Debts				
Charge Accounts				
Installment Contracts				
Loans on Life Insurance				
Other Debts				
<b>Total Liabilities/Debts: \$</b>				
<b>TOTAL ESTATE: \$</b> <b>(Assets Less Liabilities)</b>				

Sources of your Property

## 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 \_\_\_\_\_

Preferred Phone ( ) \_\_\_\_\_ Email \_\_\_\_\_

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	_____

## Sample Bequest Language

Example bequest language. Please feel free to change the numbers or percentages as you desire.

**Please state whether your gift is a fixed sum, a specific asset (such as shares of stock), or calculated from the remainder of your estate:**

*“I give, devise and bequeath to the Clemson University Foundation (EIN: 57-0426335), a nonprofit corporation organized in accordance with the laws of the State of South Carolina for the purpose of supporting Clemson University, an educational institution, located at Clemson, SC (choose from a, b, or c below)”*

- a) the sum of \$\_\_\_\_\_.
- b) the following described property \_\_\_\_\_.
- c) \_\_\_\_\_% of the rest, residue and remainder of my estate.

**Select the language below that most closely matches your wishes for how your gift will be used:**

The property comprising this gift may, for investment purposes, be merged with any of the general investment assets of the Clemson University Foundation, but the gift shall be entered in the Foundation’s books and recorded as the \_\_\_\_\_  
\_\_\_\_\_ (ex., John & Jane Doe Family Endowment/Fund), and shall always be so designated. The distributions from the fund shall be used for:

- a) Unrestricted Bequest/Current Operations

*“This gift is to be used for the benefit of Clemson University to support current operations as it deems advisable with no restrictions.”*

- b) Restricted Bequest\*\*

*“This gift is to be used by (College/Dept./Program) \_\_\_\_\_  
for the following purpose: \_\_\_\_\_”*

(If a contribution is to be restricted, it is recommended that the intended provision be reviewed with University officials to be certain that your wishes may be carried out.)

c) Unrestricted Endowment

*“This gift is to be used for the benefit of Clemson University to add to its permanent endowment. Income generated from this fund shall be expended for the benefit of Clemson University to support students, faculty and programs it deems advisable with no restrictions.”*

d) Restricted Endowment Scholarship, Fellowship or Program:\*\*

*“This gift is to be used for the purpose of creating the \_\_\_\_\_.”*

(List endowment name and choice of endowed scholarship, fellowship or program area.)

If you select a specific purpose for your gift, inclusion of the following sentence will ensure that the bequest remains useful through many decades.

*“If at the time this devise and bequest is received by the Clemson University Foundation, or at any time thereafter, the Clemson University Foundation Board of Directors determines that all or part of said income of the Fund can no longer be utilized to the best advantage for the purpose designated herein, then all or any part of the annual income may be used for such other institutional purpose which, in the sole discretion of Clemson University Foundation Board of Directors, shall most closely carry out my original intent.”*

\*\*Please be advised that fund minimum may apply.

**For assistance with this form or to discuss ways you can support Clemson University through your estate plans, contact us:**

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[clemsongiving.org](http://clemsongiving.org)

**Disclosure on Attorneys and This Charity**

*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 adviser 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, health care, estate and planning circumstances.*



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ClemsonForward will position Clemson for the next 50 years and make an impact on real issues facing the people of our state and nation. Clemson Forever supports the goals of ClemsonForward through its unrelenting mission to strengthen the University by building a solid financial base of private giving, providing exemplary stewardship of those gifts and clearly communicating to donors the impact of their gift and the gratitude of the Clemson Family.

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