



*Unlock the Door
to Nine Great
Suggestions*



**Check out
the details
below!**

**...that can help
you
create
a better,
more efficient
Will.**



Our charitable organization is not engaged in rendering legal or tax advisory service. For assistance of this nature, the services of an attorney or other professional advisor should be obtained. This pamphlet was written to provide information of a general nature only. Watch for tax revisions. Always seek legal counsel when considering wills, trusts and charitable gifts made in the contractual agreement.

1 **Make A Will Today!**

Waiting won't get it done. Tomorrow could be too late. Unless you have a valid Will or other legal agreements before you die, your property might not go to those you wanted to receive it. Making promises or talking about leaving gifts to relatives or charitable groups like us isn't good enough. You need that Will now.

2 **Consult An Attorney!**

If you want things done right, get an attorney who knows the ins and outs of estate planning. His or her services can save you and your heirs money in the long run. Spend a little now, and save on future probate costs and other legal expenses.

3 **Keep People Informed!**

Keep your family informed as to the existence and location of your Will. This does not mean you have to share the contents with them; it merely speeds up the process of knowing and fulfilling your wishes later on. And if you plan to remember a charitable group like us in your Will, let us know ahead of time as well. We might be able to offer suggestions about the best kinds of gifts you can give us.

4 **Pick More Than One Person!**

Expect the unexpected to happen! Be sure to name several alternate persons as executors of your Will in case your first or even your second choice should die or be otherwise unable to serve. And should it happen that all the beneficiaries mentioned in your Will are gone, you can name a FINAL beneficiary - perhaps a charitable group like us that will be here for some time to come.

5 **Think Percentage!**

Since you never know exactly how much you will own at the time of your death, Wills that specify that a certain percentage of the estate be given to a particular person or charitable group can assure that all bequests will stay in proportion to each other, thus reducing the possibilities of hurt feelings and fighting among beneficiaries.

6 **Think Memorials!**

Many people never even consider this point! You can use your Will to leave memorial gifts in remembrance of special family members or other loved ones. Let your attorney know. He or she can include a memorial bequest in your Will with us or another charitable group.

7 **Be Less Restrictive!**

Keep your gift flexible. If you set too many conditions on your gift, you may unwillingly be tying the hands of your beneficiaries to use your gift in the best way possible. In general, the less restrictive you are, the more helpful your gift will be.

8 **Keep Things Updated!**

An out-of-date Will is almost as bad as not having one at all! Things change in your life. Laws change; property values change. Bank accounts are opened and closed. Your possessions are always increasing or decreasing. Your attitudes toward people change. Keep your Will updated so that your wishes can be carried out for you.

9 **Use Legal Names!**

If you do name a charitable organization or another group in your Will, be sure your attorney has its full legal name to use. This will avoid confusion and problems later on. Our legal title is:

The Pallottine Fathers and Brothers, Inc.

5424 W. Bluemound Road Milwaukee, WI 53208

(414) 259-0688 ext. 151