



“I see life as both a gift and a responsibility. My responsibility is to use what God has given me to help his people in need.”

— Millard Fuller  
Habitat for Humanity co-founder

## Your support is critical

As you start or revise your plans, we hope you will consider creating a legacy with Habitat for Humanity to help families build strength, stability and self-reliance through shelter. Breaking the cycle of housing instability and empowering families for generations to come can be part of your life story when you designate your legacy gift for Habitat for Humanity.



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

If you'd like to help future families access stable shelter by including a gift to Habitat for Humanity in your will, please consider using the following language:

“After taking care of all expenses, debts and other provisions, I give, devise and bequeath \_\_\_ percent of the rest and residue [or \$\_\_\_ if a specific amount] to Habitat for Humanity International, a Georgia-based charitable organization [Tax ID# 91-1914868] currently with administrative offices at 322 West Lamar Street, Americus, Georgia 31709-3543.

We're here to provide information about the ways you can support breaking the cycle of housing instability for families who partner with Habitat for Humanity. We'll be able to guide you on different giving methods and help find one that works best for you and your philanthropic goals.

### We're here to help.



**Jeremy Kraut-Ordovery, CFRE**  
Vice President  
800-422-4828, ext. 3614  
[plannedgiving@habitat.org](mailto:plannedgiving@habitat.org)

You can also visit our legacy website at [myhabitatlegacy.org](http://myhabitatlegacy.org).



**Mailing address:**  
Habitat for Humanity International  
322 West Lamar Street  
Americus, Georgia 31709-3543

This information is not intended as legal, accounting or other professional advice. For assistance in charitable planning, consult an attorney for legal advice or obtain the services of another qualified professional.

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## How to create or update your estate plans

### Getting Started Guide

# Planning ahead means you're in control

All of us understand the importance of planning.

Just as Habitat for Humanity carefully plans to address the current and future needs of homeowners and communities, you probably make plans to **provide for your loved ones and causes you care about.**

But where and how should you start your estate planning? If you already have plans, what should you consider when updating them? As time goes on, situations in life change and the needs of family and friends may change as well – which means it may be time to revisit your plans and make updates.

Having an estate plan in place gives you peace of mind that your intentions will be carried out as you wish after your lifetime. Planning ahead gives you control over your legacy and the values you wish to live on after you.

Within this guide, we'll give you tips on how to organize your plans and make sure they're up to date with your current life situation.



## How do I start an estate plan?

- Make a list of everything you own – such as real estate, bank and investment accounts, retirement accounts, life insurance, personal collections, jewelry, cars and boats. Nothing is too trivial!
- Decide who will receive your assets – your family, other loved ones and the causes you care about.
- Choose a qualified guardian for your minor children and name that person in your will.
- Depending on whether you have a will or living trust, choose your executor or successor trustee, who will be responsible for seeing that the terms of your will or living trust are carried out in full.
- Execute powers of attorney that name the person(s) who will make healthcare and financial decisions for you if you become unable to do so.
- Appoint a healthcare agent to make end of life decisions for you if you become unable to do so.
- Consult with an attorney who specializes in estate planning, who will create or advise you in creating a will or living trust and other necessary estate documents.

## When should I revisit a plan?

Here's a checklist of reasons you may want to revisit and revise your estate plan:

- Family members have passed away or your wishes have changed.
- New family members are present, through birth or adoption.
- Divorce or marriage.
- Children achieve financial independence/marry.
- New federal and state laws.
- Change in guardians, executors or trustees.
- A substantial increase or decrease in the value of your assets.
- The sale, purchase or loss of a significant asset.
- You have not revisited your estate plan in three to five years.
- You've moved to a new state.
- Your health status has changed.
- You've changed jobs.

