

CHARITABLE ESTATE PLANNING CHECKLIST



Preparing a will and other estate planning documents is important to the people and organizations you care about. Keeping these documents organized and in one place will make it easier for your loved ones to settle your affairs. This checklist can assist you in gathering information to prepare for a meeting with your attorney.

Your Personal Information:

- Birth date
- Birth place
- Social security number
- Date of marriage
- City and state of marriage ceremony

Pets:

- Name
- Breed and description
- Veterinarian name and contact information

Financial Information:

- Bank accounts
- Brokerage accounts
- Retirement accounts
- Other investments
- Life insurance
- Mortgages and debts
- Real estate owned
- Businesses owned
- Personal property (cars, jewelry, etc.)
- Other assets

Other Information and Documents:

- Previous will or trust document
- Power of attorney
- Health care directive
- Location of safe deposit box and key
- Location of stocks and bond certificates not held in brokerage accounts

Your Advisors:

- Attorney
- Accountant
- Financial advisor

Family Members:

Include address and birth date for each person

- Children
- Grandchildren
- Siblings
- Parents
- Nieces and nephews

Beneficiaries:

- Names of individual beneficiaries
- Names of charitable beneficiaries
- Beneficiary's Address
- Beneficiary's Phone number
- Social Security Number or Tax ID Number

Employment History:

- Employer names
- Employer address
- Dates of employment
- Pension or retirement fund benefits

Digital Assets:

- Online accounts
- Social media
- Email
- Subscriptions
- Cloud storage and cell phone apps

Location of Personal Documents:

- Birth certificate
- Adoption records
- Naturalization records
- Marriage certificate
- Divorce decree or separation agreement
- Military records

Information for Attorneys and Advisors

Chester County Hospital is grateful for the generous support of people throughout our community. We can assist you in supporting our programs today or creating a plan for tomorrow.

*If you are planning to include a charitable gift for The Chester County Hospital Foundation in your will or estate plans, please see the information below. Contact our office if you, or your attorney, have questions or need additional information.

Legal Name

The Chester County Hospital Foundation

Federal Tax Identification Number/EIN

23-2267407

Sample Bequest Language for a Will

*"I give, devise, and bequeath _____% of the residue of my estate (or \$_____) to
The Chester County Hospital Foundation, in West Chester, Pennsylvania, for general support of Chester County
Hospital."*

Contact the Foundation for specific gift language to restrict a bequest to a particular use or endowment fund. This language will ensure a gift is used for its intended purpose.

Beneficiary Designation Forms

Use the following address when completing a change of beneficiary form for an IRA, 401k, donor advised fund, Health Savings Account, life insurance policy or other account:

The Chester County Hospital Foundation
701 E. Marshall Street
West Chester, PA 19380

All donations to The Chester County Hospital Foundation benefit programs and services at Chester County Hospital. A gift is used where the need is greatest at the time it is received, unless restricted to a specific purpose or endowment fund. Donors are encouraged to confirm their gift details in writing with the Foundation.

The Chester County Hospital Foundation does not offer tax or legal advice and encourages individuals to consult with their advisors regarding this information.