MOODY BIBLE INSTITUTE™

WILL AND ESTATE

Planning Guide

Spread God's Word Around the World Through Your Legacy

Secure your family's future and make an eternal impact by supporting Moody in your estate plan.

Your gift can help us continue to advance the gospel to those in need all over the globe.

Thank you for considering Moody in your estate planning. Your intention to include us in your legacy planning is a profound expression of your faith and commitment to the Great Commission. Your gift will have a lasting impact, equipping the church to bring the hope and love of Christ to the world.

At Moody, we are committed to advancing God's kingdom work for maximum eternal impact. By including us in your estate plans, you join us in this vital mission. Your legacy will live on through our many ministries that can continue to operate through your generosity.

Which Moody ministries have influenced you the most? You can choose to support those closest to your heart, including Education, Moody Radio, *Today in the Word*, Moody Publishers, and Moody Aviation. Or you could leave a bequest to Moody to be used for its general ministry purposes.

Your gift helps us continue to advance the gospel to those in need all over the globe. Through you and your legacy gift, Moody can **proclaim** the gospel, **equip** the church, and **train** the next generation with the truth of God's Word.

This practical booklet is your guide to understanding the profound impact your gift can make and the meaningful legacy you can leave behind. The forms found in the back of this guide will help you gather information for your attorney to use as you update your estate plan.

This Estate Planning Guide has been prepared for informational purposes only. It is not intended to provide or be relied on for tax, legal, or accounting advice. You should consult with your own tax, legal and accounting advisors in order to determine what may be best for your individual needs.

QUESTIONS? Please feel free to contact us:

Moody Bible Institute Planned Giving
820 N. LaSalle Blvd., Chicago, IL 60610

moodylegacy.org

plannedgiving@moody.edu

(800) 801-2171

Making Your Will a Matter of Christian Stewardship

Each of us has an estate. Your Christian stewardship of that estate allows you to continue giving beyond your own lifetime.

Christian stewardship in estate planning is an expression of faith, demonstrating a commitment to manage God's blessings in a way that honors Him and furthers His kingdom. It reflects a deep understanding that all we have is entrusted to us by God, and through careful and prayerful planning, we can ensure that our resources continue to support His work even after we are gone.

You have diligently worked to build your estate, recognizing your labor as a stewardship entrusted to you by God. Every decision, every investment, and every effort reflects your commitment to glorify Him through responsible management of the resources He has provided. In the same way, thoughtful planning should go into how your assets are distributed after your death. Just as you have aimed to honor God in life through wise and faithful stewardship, you have the opportunity to continue this legacy through intentional estate planning. This decision will ensure that your assets support the spread of the gospel, aid ministries, and positively impact lives for Christ, aligning with the values and principles that guided you as a Christian.

You may feel you have not accumulated much financial wealth and assume you really do not need an estate plan or will. Scripture, however, reminds us to be good stewards of what the Lord has entrusted to us. Sadly, 65 percent of people do not have a valid will when they die. If you do not have an estate plan, the state will decide how to distribute your assets, robbing you of the opportunity to have a say and support the causes you love.

> Therefore, as we have opportunity, let us do good to all people, especially to those who belong to the family of believers.
>
> Galatians 6:10

Why Do I Need an Estate Plan?

Honor the Lord with your wealth.

Proverbs 3:9

Estate planning is more than just arranging for the distribution of your assets. It's an opportunity to reflect your values, beliefs, and priorities in a tangible way. Without an estate plan, the laws of your state determine what happens to your assets and minor children upon your passing. These laws may distribute your assets in a way you would not have chosen or place your children in the care of an individual you would not have selected.

With proper planning, you can both care for your loved ones and also support the Lord's work past your lifetime. Estate planning is an essential aspect of stewardship and responsible financial management. It's an opportunity to ensure that your values and passions are reflected in how your assets are utilized beyond your lifetime.

Through proper estate planning, you can establish a distribution plan that will give your loved ones the property you acquired in the ways and in the amounts you desire, and also support causes and ministries that you are passionate about after your death. By including Moody in your estate plans, you're securing a lasting legacy that aligns with your Christian beliefs and supports the causes you hold dear.

You can also protect the future of your minor children by nominating a legal guardian in your will that may be appointed in the event both parents pass. You can also set up a trust fund through your will that can provide for your minor children's financial needs.

An Opportunity for Christian Stewardship

Your estate is the material representation of your life. It has been acquired and accumulated through hard work, careful management, and prudent investment. The distribution of your wealth upon your passing is your final act of financial stewardship and gives you the opportunity to extend your responsibility and your influence for Christ into the future.

What share of your estate do you want to invest in the continuing work for the Lord? The distribution of your wealth at death is a final opportunity to express your gratitude to God and your love for Christ through what He has entrusted in your care.

After you have provided for your family's needs, would you consider making a generous provision for the work of the Lord through Moody Bible Institute? We believe in the transformative power of God's Word and lives grounded in faith. By including Moody in your estate plans, you become a partner in this transformative journey. Your legacy will empower future generations to proclaim the gospel and impact the world for Christ, equipping them with the spiritual foundation they need to thrive.

There are cost-saving vehicles available to you that can help you meet your objectives for both family and your favorite ministries. Having a valid, up-to-date estate plan is fundamental to achieving these objectives.

We invite you to prayerfully consider how God is leading you to invest in His kingdom through Moody.

If you have a will or trust but have not recently reviewed it, now is the time to do so. If you have never made a will or trust, arrange to discuss this important matter with your attorney soon. Without an estate plan, you risk unfulfilled objectives in providing for your loved ones and charitable interests.

We understand that estate planning can be complex, which is why we're here to assist you every step of the way. Our Gift Planning team can provide personalized guidance, resources, and support to help you navigate the process with confidence and clarity.

Will you join us in our mission to train current and future leaders to shine the light of Christ for all cultures and generations? We invite you to prayerfully consider how God is leading you to invest in His kingdom through Moody.

Ask yourself if these three things are true of you:

- ✓ Your first concern is for your loved ones.
- ✓ You want to conserve as much of your estate as possible by reducing administrative costs and taxes.
- ✓ You believe in the ministries of Moody Bible Institute and other charitable organizations.

Important Steps in the Estate Planning Process

See that you excel in this grace of giving.

2 Corinthians 8:7

1. **Clarify your objectives.** Exactly what do you want to accomplish for yourself, your dependents, others, and for the work of the Lord through your estate plan?
2. **Inventory your estate.** Exactly what assets do you have in your estate to accomplish your objectives?
3. **Choose an estate planning attorney** in whom you have confidence. Make an appointment to see him or her as soon as possible. The fee for the attorney's services should be discussed at the outset.
4. **Update any previous will or trust**. If you have a will or trust that is outdated due to changes in law, residence, family relationships, personal circumstances, or if you wish to include ministries or other charitable organizations not presently included in your will or trust, note those changes on the forms in this booklet and take them to your attorney.
5. **Fill out the forms** located in the back of this planning booklet before seeing your attorney.
6. **Take this booklet to your attorney** and ask him or her to assist you in implementing your estate plan according to your wishes.
7. **File your will, trust, or other estate planning documents in a safe place** where it cannot be accidentally burned or destroyed, and where it will be available to your executor or trustee at your death.
8. **Notify Moody Bible Institute if you have remembered Moody in your estate plan.** This information is appreciated and will be kept confidential.

QUESTIONS? For further information on estate planning, contact us:

Moody Bible Institute Planned Giving
820 N. LaSalle Blvd., Chicago, IL 60610

moodylegacy.org

plannedgiving@moody.edu

(800) 801-2171

Remembering the Ministries of Moody Bible Institute

Suggested methods and wording

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

1. Specific Bequest

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

Bequest of a Specific Dollar Amount

I hereby give, devise and bequeath _________ dollars ($ DOLLARS) to THE MOODY BIBLE INSTITUTE OF CHICAGO, a nonprofit organization currently located at 820 N. LaSalle Blvd., Chicago, IL 60610, for its general use and purpose.

Bequest of Specific Personal Property

I hereby give, devise and bequeath [DESCRIPTION OF PROPERTY] to THE MOODY BIBLE INSTITUTE OF CHICAGO, a nonprofit organization currently located at 820 N. LaSalle Blvd., Chicago, IL 60610, for its general use and purpose.

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 THE MOODY BIBLE INSTITUTE OF CHICAGO, a nonprofit organization located at 820 N. LaSalle Blvd., Chicago, IL 60610, for its general use and purpose.

2. Percentage Bequest

If you are considering making a bequest of a percentage of your estate to Moody, we recommend the following language:

I hereby give, devise and bequeath ____ percent (___%) of my total estate, determined as of the date of my death, to THE MOODY BIBLE INSTITUTE OF CHICAGO, a nonprofit organization currently located at 820 N. LaSalle Blvd., Chicago, IL 60610, for its general use and purpose.

3. Residual Bequest

I hereby give, devise and bequeath to THE MOODY BIBLE INSTITUTE OF CHICAGO, a nonprofit organization currently located at 820 N. LaSalle Blvd., Chicago, IL 60610, [ALL OR A PERCENTAGE] of the rest, residue, and remainder of my estate to be used for its general use and purpose.

4. Contingent Bequest

If [primary beneficiary] does not survive me, then I hereby give, devise and bequeath to THE MOODY BIBLE INSTITUTE OF CHICAGO, a nonprofit organization currently located at 820 N. LaSalle Blvd., Chicago, IL 60610, [DESCRIPTION OF PROPERTY] to be used for its general use and purpose.

5. Restricted Bequests

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

If, in the judgment of the Board of Trustees of THE MOODY BIBLE INSTITUTE OF CHICAGO, it shall become impractical for THE MOODY BIBLE INSTITUTE OF CHICAGO to use this bequest to accomplish the specific purposes of this bequest, THE MOODY BIBLE INSTITUTE OF CHICAGO may use the income and principal of this gift for such purpose or purposes as the Board determines is most closely related to the restricted purpose of my bequest.

The next section should be completed and submitted to your own attorneys as they create your estate plan. The Information for Attorney's Use will help them expedite the preparation of your estate plan.

Information for Attorney's Use

Confidential, Personal, and Financial History

Date ____________________

1. FAMILY AND GENERAL

Your Personal Information:

Name ____
First *Middle* *Last*

Address ____

City ____

State ________________________ Zip ________________________

Residence Phone ________________________ Business Phone ________________________

Email ____

Occupation ____

Date of Birth ________________ Social Security Number ________________________

☐ Single ☐ Married ☐ Widowed ☐ Separated ☐ Divorced

Your Spouse's Information: *If you are married, please provide your spouse's information below.*

Name ____
First *Middle* *Last*

Address ____

City ____

State ________________________ Zip ________________________

Residence Phone ________________________ Business Phone ________________________

Email ____

Occupation ____

Date of Birth ________________

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

☐ Yes ☐ No

Information for Attorney's Use

Your Children's Information:

- ☐ I have no living children
- ☐ I have the following children:

❶ Name ______________________________
First *Middle* *Last*

Address ______________________________

City ______________________________

State ______________________________ Zip ______________________________

Married to ______________________________ Date of Birth ______________________________

Phone ______________________________ Email ______________________________

❷ Name ______________________________
First *Middle* *Last*

Address ______________________________

City ______________________________

State ______________________________ Zip ______________________________

Married to ______________________________ Date of Birth ______________________________

Phone ______________________________ Email ______________________________

❸ Name ______________________________
First *Middle* *Last*

Address ______________________________

City ______________________________

State ______________________________ Zip ______________________________

Married to ______________________________ Date of Birth ______________________________

Phone ______________________________ Email ______________________________

Information for Attorney's Use

❹ Name ______________________________
First *Middle* *Last*

Address ______________________________

City ______________________________

State ______________________________ Zip ______________________________

Married to ______________________________ Date of Birth ______________________________

Phone ______________________________ Email ______________________________

❺ Name ______________________________
First *Middle* *Last*

Address ______________________________

City ______________________________

State ______________________________ Zip ______________________________

Married to ______________________________ Date of Birth ______________________________

Phone ______________________________ Email ______________________________

❻ Name ______________________________
First *Middle* *Last*

Address ______________________________

City ______________________________

State ______________________________ Zip ______________________________

Married to ______________________________ Date of Birth ______________________________

Phone ______________________________ Email ______________________________

❼ Name ______________________________
First *Middle* *Last*

Address ______________________________

City ______________________________

State ______________________________ Zip ______________________________

Married to ______________________________ Date of Birth ______________________________

Phone ______________________________ Email ______________________________

Information for Attorney's Use

2. ASSETS OWNED

Checking Account

Name of Bank ______________________________

Account in Name(s) of ______________________________

Bank Address ______________________________ Amount $ ____________

Savings Account

1. Name of Bank ______________________________

   Account in Name(s) of ______________________________

   Bank Address ______________________________ Amount $ ____________

2. Name of Bank ______________________________

   Account in Name(s) of ______________________________

   Bank Address ______________________________ Amount $ ____________

Securities (Stocks, bonds, etc.)

1. Issuing Company ______________________________ Value $ ____________

   Title in name(s) of ______________________________

2. Issuing Company ______________________________ Value $ ____________

   Title in name(s) of ______________________________

3. Issuing Company ______________________________ Value $ ____________

   Title in name(s) of ______________________________

Information for Attorney's Use

Life Insurance

1. Issuing Company ______________________ Face Value $ __________

   Beneficiaries ______________________

2. Issuing Company ______________________ Face Value $ __________

   Beneficiaries ______________________

Real Estate

1. Address of Property ______________________

   Title in name(s) of ______________________ Approx. Value $ __________

2. Address of Property ______________________

   Title in name(s) of ______________________ Approx. Value $ __________

Safe Deposit Box

Bank ______________________

Title in name(s) of ______________________

3. MISCELLANEOUS ASSETS

Automobiles, Jewelry, Furniture, and Household Items

1. ______________________ Title in name(s) of __________
2. ______________________ Title in name(s) of __________
3. ______________________ Title in name(s) of __________
4. ______________________ Title in name(s) of __________
5. ______________________ Title in name(s) of __________
6. ______________________ Title in name(s) of __________
7. ______________________ Title in name(s) of __________

Information for Attorney's Use

4. BUSINESS PROPERTY *(Please give details)*

1. Assets Owned ______________________

   Location ______________________

   Title in name(s) of ______________________

2. Assets Owned ______________________

   Location ______________________

   Title in name(s) of ______________________

5. INDEBTEDNESS *(Please give details)*

____

____

6. DISTRIBUTION OF ESTATE *(Specific Bequests. List only those items consisting of cash, or other specific property such as art, antiques, coin collection, etc., which you wish to gift to a specific person.)*

1. Beneficiary ______________________ Relationship ______________________

   Item ______________________

   Beneficiary address ______________________

2. Beneficiary ______________________ Relationship ______________________

   Item ______________________

   Beneficiary address ______________________

3. Beneficiary ______________________ Relationship ______________________

   Item ______________________

   Beneficiary address ______________________

Information for Attorney's Use

7. DISTRIBUTION OF ESTATE *(Residue and Remainder. List those individuals or organizations designated to receive the remainder of your estate after all expenses have been paid and all specific bequests have been made.)*

1. Beneficiary ______________________ Relationship ______________________

   Amount or Percentage ______________________

   Beneficiary address ______________________

2. Beneficiary ______________________ Relationship ______________________

   Amount or Percentage ______________________

   Beneficiary address ______________________

3. Beneficiary ______________________ Relationship ______________________

   Amount or Percentage ______________________

   Beneficiary address ______________________

4. Beneficiary ______________________ Relationship ______________________

   Amount or Percentage ______________________

   Beneficiary address ______________________

5. Beneficiary ______________________ Relationship ______________________

   Amount or Percentage ______________________

   Beneficiary address ______________________

6. Beneficiary ______________________ Relationship ______________________

   Amount or Percentage ______________________

   Beneficiary address ______________________

Information for Attorney's Use

8. CONTINGENCY PROVISION FOR DISTRIBUTION OF ESTATE *(Indicate distribution procedure in the event above-named individuals are not living, or organizations are not in existence at the time your will is probated.)*

1. Beneficiary ______________________ Relationship______________

   Amount or Percentage ______________________

   Beneficiary address ______________________

2. Beneficiary ______________________ Relationship______________

   Amount or Percentage ______________________

   Beneficiary address ______________________

3. Beneficiary ______________________ Relationship______________

   Amount or Percentage ______________________

   Beneficiary address ______________________

4. Beneficiary ______________________ Relationship______________

   Amount or Percentage ______________________

   Beneficiary address ______________________

5. Beneficiary ______________________ Relationship______________

   Amount or Percentage ______________________

   Beneficiary address ______________________

6. Beneficiary ______________________ Relationship______________

   Amount or Percentage ______________________

   Beneficiary address ______________________

Information for Attorney's Use

9. ADMINISTRATION OF ESTATE

Office	**Name and Address of Appointee** *(Include Relationship)*
Executor	___
Alternate Executor	___
Trustee	___
Alternate Trustee	___
Guardian of Person *(for minor children)*	___
Alternate Guardian	___
Guardian of Estate	___
Alternate Guardian	___
Other	___

In case trustee is appointed, trust is to terminate when the youngest child reaches age ___ .

10. MISCELLANEOUS

☐ Include Christian Testimony
☐ Do not include Christian Testimony
☐ I have a will at the present time (copy attached)
☐ I do not have a will at the present time

Remarks

___

___

Please attach separate sheets if additional space is needed.

Will and Estate Planning Guide

If you would like additional information about partnering options at Moody, would like to request a Moody stewardship representative contact you, or have chosen to remember Moody in your estate plan, please fill out this form and mail it to the address below.

Name ____
First *Middle* *Last*

Address ____

City ____

State ____________________ Zip ____________________

Phone ____

Email ____

☐ Yes, I have completed my estate plan and remembered the ministries of Moody Bible Institute.

☐ Please have a Stewardship representative contact me.

Please send me more information about:

☐ Moody Managed Revocable Living Trusts

☐ Moody Managed Charitable Remainder Unitrusts

☐ Moody Managed IRAs

☐ Charitable Gift Annuities

☐ Pooled Income Fund

Please complete this page and mail to:

Moody Bible Institute
Planned Giving Office
820 N. LaSalle Blvd.
Chicago, IL 60610
(800) 801-2171
plannedgiving@moody.edu
moodylegacy.org

Gift Planning

Estate Planning Checklist

Before meeting with your attorney, please check each item completed or in hand.

__________ 1. Legal name, permanent address, date of birth

__________ 2. Date and place of marriage; if divorced or separated, provide details

__________ 3. Pre- or post-nuptial agreements

__________ 4. Current wills and codicils

__________ 5. Living trust agreements (revocable or irrevocable)

__________ 6. Names and addresses of children and other heirs

__________ 7. Employment information

__________ 8. Names and addresses of persons to be your personal representative, guardian, and/or trustee

__________ 9. Income tax returns for last three years

__________ 10. Gift tax returns

__________ 11. Life insurance policies

__________ 12. Information on pensions, profit sharing, and deferred compensation plans

__________ 13. Business agreements related to corporations, partnerships, and sole proprietorship interests

__________ 14. Listing of all real estate including ownership, location, value

__________ 15. Listing of personal property including ownership, present fair market value, and mortgages

__________ 16. Outline of objectives for disposition of your estate

__________ 17. Legal names and addresses of charitable organizations you wish to benefit

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