**STRATEGIC**

**LIFE**

**PLANNING**

**2018**

**PLANNING YOUR FUTURE STARTS…NOW!**

**NAME:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**DATE:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Presented by: Earl Turner & David Settle

Courtesy of: NewBranch Community Church

**STRATEGIC**

**LIFE**

**PLANNING**

**2018**

**When you care enough to do the very best for your family.**

**Ephesians 5:22 – 32**

**Family and Estate Planning**

**By preparing your estate and health care plans in advance, you will be prepared when life’s storms strike. Most importantly, in a time of grief, your family will need guidance with respect to each ones health care and estate. By taking a moment to create these documents now, you can help to ensure that you and your family will have peace of mind going forward.**

**NAME:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**.

**DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**.

Presented By: Earl Turner & David Settle

Courtesy of: NewBranch Community Church

February 20, 2018

Dear Friend,

**RE: Life Planning Awareness Memo**

We want to share with you some of our life lessons that we have learned from the passing of my wife and father, and David’s father. We are currently sharing this information with the members of our church, NewBranch Community Church, in Buford, Georgia.

 We are calling this program – **Strategic Life Planning 2018**. The attached portfolio contains information on the program including additional documents that would be good to have located in one place. We are proposing two steps to help families be better prepared for life’s storms.

**Step 1:** **Complete 5 time-sensitive documents**

1. Last Will and Testament

2. Living Will

3. Medical Power of Attorney

4. Financial Power of Attorney

5. Insurance (i.e.: Term, Whole Life, Long Term Care, Final Expenses, etc.)

**Step 2:** **Develop a system for storing all important family, legal, and financial documents.** We are proposing that each family have a **three ring binder** to file all the appropriate documents (both Step 1 and Step 2). Also, you could store this information electronically if you prefer.

Please feel free to share this information with your relatives, friends, neighbors and your church family. If you would like an electronic version of this information, just let Earl know by email. Please note that this information is provided for **free** and is all **public domain**.

**To God be the Glory.**

Warm regards,

Earl Turner David Settle

770-331-8809 706-424-9504

earl@earlturner.net dasettle2@gmail.com

Strategic Life Planning

 2018

● **OVERALL PURPOSE:**

 To share some lessons that David Settle & I have learned while going through some of life’s storms that may be of benefit to you. Namely a repository of important documents readily available, at you fingertip, when one of life’s storms comes your way.

● **DISCLAIMER:**

 ~ We are not selling anything

 ~ We are not offering any legal advice

 ~ We are not offering any financial advice nor estate planning

 ~ This information is being freely offered so that God would

 receive all the glory

● **WHO:** To every family in the church

● **WHAT:** 5 time-sensitive documents to complete and a repository for storing such documents with an index that can be used both as a guide and a checklist

●**HOW:** That is the question. Please see the following page(s)

**STRATEGIC LIFE PLANNING 2018**

**How to Implement the SLP Program**

**Step 1: Complete the Following Foundational Documents**

●Last Will and Testament

●Advanced Directive for Healthcare

 - Includes both a Living Will and

 Medical Power of Attorney

●Durable Power of Attorney – Financial

●Insurance (i.e.: Select from the following):

 - Whole Life Insurance

 - Term Life Insurance

 - Long Term Care Insurance

 - Health Insurance

 - Supplemental Insurance

 - Final Expenses Insurance

**Step 2: Use the SLP Dashboard to record existing documents and identify additional required documents.**

 The **Dashboard**, which you can download on the Strategic Life Planning webpage, can be used as a **“checklist”** for documents already existing and a **“To Do”** list for documents that are required. The **Dashboard** acts as a table of contents page. The documents can be filed in a **three ring binder** or electronically per your preference. This will become your repository of **IMPORTANT** documents that should be reviewed annually and stored in a safe location. See the **SLP Dashboard** listing documents that are sorted by Category.

**Estate, Wills, and Power of Attorney Definitions**

Quickly and easily plan for your future with LawDepot

LawDepot makes estate and health care planning easy with self-guided questionnaires designed to help you understand the process and get your estate and health care documents in place quickly.

Estate Planning

**What is estate planning?**

Planning your estate properly prepares for the distribution of your assets after you die to help ensure there are no uncertainties regarding your intended wishes.

**What is the benefit of estate planning?**

Estate planning serves many purposes. Creating a Last Will and Testament allows you to have direct control over where your assets go after your death, as opposed to the government deciding how your assets will be divided.

More specifically, it ensures that your loved ones are cared for should you ever pass away suddenly. It also alleviates any unnecessary stress on your loved ones if they know that you have prepared clear and thoughtful instructions on how to administer your estate.

**What do I need to plan my estate?**

Everyone should plan their estate using a Last Will and Testament to specify which family members, friends, or organizations they intend to leave assets to. In your Will, you name an executor to carry out your estate plans. He or she is in charge of seeing to your estate's dispersal.

**When should I create a Will?**

People often put off making a Will because they don't think they have enough assets, or they believe Wills are only reserved for the ill or elderly. Once you are the legal age (18 in most states), you are free to start planning your estate, especially if you have children or expect to at some point. Your Will doesn't need to be complicated, and in 5-10 minutes you can easily create one on your own.

After creating your Will, it can be updated as necessary, such as after major life events (divorce, death, children, or illness), or you can make minor changes to it using a Codicil.

**SOURCE:** <https://www.lawdepot.com/contracts/groups/estate/#.WfC4WmhSyM8>

Health Care Planning

**What is advance health care planning?**

Advance health care planning refers to documenting your wishes regarding your medical treatment in the event you are no longer able to communicate these decisions for yourself. It also refers to legally appointing an individual to make health care decisions for you.

**Why is advance health care planning important?**

Advance planning is extremely important for unplanned events or situations, such as if you suddenly become sick or incapacitated.
Without having health care documents in place, family members are forced to make tough decisions on your behalf. Preparing your wishes in advance gives your family, as well as your health care professionals, a clear indication of what types of treatment you want to receive in specific situations. That way, if an unforeseen medical problem does occur, you have made your wishes known and don't leave the burden of making life-altering choices up to a family member.

**What do I need to plan my health care in advance?**

To plan your health care wishes in advance, you will need a Living Will, also referred to as a Health Care Directive, which allows you to specify your perspective on personal medical treatment. You may also wish to designate a Medical Power of Attorney (Health Care Proxy or Health Care Representative) to make medical decisions on your behalf. Usually a Health Care Proxy is someone you can trust and has your best interests in mind. It's important to share your treatment wishes with your Proxy so they are aware and can make the best decisions possible for you.

**When should I start health care planning?**

Like estate planning, it's never too early to document your health care wishes. Accidents or illnesses can happen suddenly, so it's best to plan ahead when you are in the right frame of mind to give your own medical treatment some consideration.
Similar to a Will, your Living Will can be updated as often as necessary to reflect your current wishes regarding your health.

Family and Estate Planning

By preparing your estate and health care plans in advance, you can protect your family should something happen to you. Most importantly, in a time of grief, your family will need guidance in respect to your health care and estate. By taking a moment to create these documents now, you can help to ensure that you and your family have peace of mind moving forward.

**SOURCE:** <https://www.lawdepot.com/contracts/groups/estate/#.WfC4WmhSyM8>

**STRATEGIC LIFE PLANNING 2018**

**POTENTIAL RESOURCE LIST**

●**Internet** (i.e.Some are FREE, with a trial subscription)

 - [www.legalcontracts.com](http://www.legalcontracts.com)

 - [www.lawdepot.com/onlineforms/allstates](http://www.lawdepot.com/onlineforms/allstates)

 - Also try GeorgiaLegalForms.com + others

●**Office Supply Stores** (Various forms with CD)

 - Office Depot, Office Max, Staples + others

●**Legal Services** (Requires a subscription)

 - Legal Zoom, Legal Shield + others

●**Attorneys** (Check online listings in your area)

●**Financial Planners** (Check online listings in your area)

Scripture References

|  |  |
| --- | --- |
| **REFERENCE** | **SCRIPTURE** |
| Proverbs 11:14 | **14** Where there is no guidance the people fall, But in abundance of counselors there is victory. |
| Proverbs 16:13 | * The lot is cast into the lap, but its every decision is from the Lord.
 |
| Proverbs 19:21 | * Many are the plans in the mind of a man, but it is the purpose of the Lord that will stand.
 |
| Psalms 33:10 | * The Lord brings the counsel of the nations to nothing; he frustrates the plans of the peoples.”
 |
| Isaiah 46:10 | * [The Lord] declares the end from the beginning . . . saying, “My counsel shall stand, and I will accomplish all my purpose.”
 |

 .