

# Planning Your Will and Legacy



When preparing your will, your first priority is caring for the people who depend on you. A thoughtful estate plan provides clarity, reduces uncertainty, and reflects the values that have shaped your life.

If your estate is sizable, you may wish to consult with a financial planner, estate attorney, or another trusted resource to explore whether a trust is appropriate. In some cases, family or charitable trusts can help manage assets efficiently and may reduce estate or inheritance taxes. You will also want to select an estate administrator, often referred to as an executor.

As part of this process, many people also choose to remember organizations and causes that have mattered deeply to them. Including a charitable organization in your estate plan is one way to extend your impact beyond your lifetime.

## A LEGACY WITH AFEDJ

For more than four decades, AFEDJ has existed to support the Episcopal Diocese of Jerusalem and sustain diocesan healthcare, education, and humanitarian services across the region.

Legacy gifts help ensure this work can continue over the long term, even as needs shift and circumstances change.

By including AFEDJ in your estate plans, you provide flexible, future support that allows the Diocese to respond where care and stability are most urgently required.

## WAYS TO INCLUDE AFEDJ IN YOUR WILL

A legacy gift can take several forms:

- An outright monetary bequest
- A percentage of your estate
- A specific asset, such as securities, real estate, or personal property
- A trust created through your will
- A contingent bequest, in which AFEDJ receives assets if other beneficiaries do not survive

Charitable bequests to AFEDJ are generally deductible from the taxable value of your estate, in accordance with current law.

## SAMPLE BEQUEST LANGUAGE

*“I give (\_\_\_ percent of/\_\_\_ dollars from/ a specific asset) from my estate to the American Friends of the Episcopal Diocese of Jerusalem, a nonprofit organization based in the United States, to be used for its general purposes (or specify a particular area of support).”*

## KEEPING YOUR PLAN CURRENT

At its core, a will reduces uncertainty, lightens the burden on those you leave behind, and affirms the people and purposes that have mattered most throughout your life. Once you have a will in place, think about access and continuity. Make sure at least one trusted person knows where the final version is kept and how to locate it if needed. Many people choose to store copies in more than one secure location, including with their attorney.

Some details are better shared in advance rather than tucked away—any information that may be needed quickly is best held by a family member, executor, or another advisor who can act without delay.

An estate plan is not static once complete. Over time, shifts in family, finances, or the legal landscape may call for updates. Periodic reviews will help ensure your intentions remain clear and relevant.

If you would like to discuss how a legacy gift to AFEDJ can align with your estate plans, our Development team is available to answer questions and provide additional information. Please contact Sarah Schofield-Mansur, Sr. Director of Individual Giving, by email at [sarah@afedj.org](mailto:sarah@afedj.org) or by phone at (617) 834-9522.