



You and Your Estate: Asset and Financial Assessment

Here at the Aga Khan Foundation USA, we believe that planning for the future is essential, and we understand the importance of ensuring a financially secure future for those you care about. This estate planning toolkit can help you begin thinking about how you want to plan for the future. We encourage you to think about how you want your estate to be managed and how you want your assets to be distributed. When writing your estate plan, your legal and financial advisors will have a lot of questions. This toolkit is designed to help you think through those questions.

We have provided this planning guide for your benefit. Feel free to take the time to review the different sections. Most of this information you will know or have readily available. Please remember that this toolkit does not legally stand as your will; it is simply a way for you to account for all that you have earned over your lifetime. Be sure to share this guide with your legal advisors, as well as your family.



YOU AND YOUR FAMILY

YOUR FULL LEGAL NAME

DATE OF BIRTH

HOME ADDRESS

CITY, STATE, ZIP CODE

PRIMARY CONTACT NUMBER

SECONDARY CONTACT NUMBER

PERSONAL EMAIL ADDRESS

EMPLOYER

JOB TITLE

WORK CONTACT NUMBER

WORK EMAIL ADDRESS

MALE FEMALE

MARRIED SINGLE DIVORCED
 WIDOWED LEGALLY SEPERATED

GENDER (PLEASE SELECT ONE)

PRESENT MARITAL STATUS (PLEASE SELECT ONE)

CHECK WHICH DOCUMENTS YOU CURRENTLY HAVE:

Will Living Will Trust Living Trust

Durable Power of Attorney (Health) Durable Power of Attorney (Finances)

Other (Please Specify): _____



YOUR CHILDREN'S INFORMATION

CHILD'S FULL
LEGAL NAME

DATE OF BIRTH

HOME ADDRESS

CITY, STATE, ZIP CODE

PRIMARY CONTACT NUMBER

SOCIAL SECURITY NUMBER

MALE FEMALE

MARRIED SINGLE DEPENDENT
 NEEDS SPECIAL CARE

GENDER

PRESENT MARITAL STATUS

ORIGIN OF CHILD

PRESENT MARRIAGE PRIOR MARRIAGE OR RELATIONSHIP ADOPTED DECEASED



ADDITIONAL CHILD'S INFORMATION

CHILD'S FULL
LEGAL NAME

DATE OF BIRTH

HOME ADDRESS

CITY, STATE, ZIP CODE

PRIMARY CONTACT NUMBER

SOCIAL SECURITY NUMBER

MALE FEMALE

MARRIED SINGLE DEPENDENT
 NEEDS SPECIAL CARE

GENDER

PRESENT MARITAL STATUS

ORIGIN OF CHILD

PRESENT MARRIAGE PRIOR MARRIAGE OR RELATIONSHIP ADOPTED DECEASED



You and Your Executor

An executor is the person legally designated to manage your estate and see your intentions through. Your executor carries out how you intend your estate to be distributed, so you should select a trusted individual who understands your circumstances and intentions fully. An executor tends to complete eight separate processes to ensure the proper distribution and transfer of your property and assets to the designated individuals/or parties:

- Submit your will to the probate court
- Locate your heirs
- Determine your estate assets and values
- Pay bills and the estate attorney
- Make debt payments
- Resolve any estate controversies
- File your income and estate tax returns
- Distribute your assets to heirs

EXECUTOR'S LEGAL NAME

HOME ADDRESS

CITY, STATE, ZIP CODE

PRIMARY CONTACT NUMBER

SECONDARY CONTACT
NUMBER

EMAIL ADDRESS

RELATIONSHIP, IF NOT SPOUSE



Your Power of Attorney – Medical

A Power of Attorney for Personal Care is a written document in which you give someone the power to make decisions about your personal care should you become unable to make these decisions yourself. Personal care can include your health care, medical treatment, diet, housing, clothing, hygiene, and safety. Although the person you give this power to is called your “attorney,” it does not mean that they are your lawyer. Most often, your attorney is your spouse, a relative, or a close friend.

FULL LEGAL NAME

HOME ADDRESS

CITY, STATE, ZIP CODE

PRIMARY CONTACT NUMBER

SECONDARY CONTACT
NUMBER

EMAIL ADDRESS

RELATIONSHIP, IF NOT SPOUSE



Your Power of Attorney - Finance

A Power of Attorney for Finance is a written document in which you give someone the power to make decisions about your property and finances if you become unable to make these decisions yourself. For example, your Attorney for Property could be responsible for taking care of your banking matters, managing your investments, running your business, buying and selling real estate on your behalf, or paying your monthly bills. The only thing that you could not appoint an attorney to do is to write your Will. Although the person you give this power to is called your “attorney,” it does not mean that they are your lawyer. Most often, your attorney is your spouse, a relative, or a close friend.

FULL LEGAL NAME

HOME ADDRESS

CITY, STATE, ZIP CODE

PRIMARY CONTACT NUMBER

SECONDARY CONTACT
NUMBER

EMAIL ADDRESS

RELATIONSHIP, IF NOT SPOUSE



YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

CHECKING ACCOUNT	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
-------------------------	------------------	-----------------------	----------------------	-------------------------

CHECKING ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
------------------	--	--------------------------	--------------------------	--------------------------

BANK & ACCOUNT NUMBER	APPROXIMATE VALUE
-----------------------	-------------------

CHECKING ACCOUNT	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
-------------------------	------------------	-----------------------	----------------------	-------------------------

ADDITIONAL ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------	--	--------------------------	--------------------------	--------------------------

BANK & ACCOUNT NUMBER	APPROXIMATE VALUE
-----------------------	-------------------

CHECKING ACCOUNT	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
-------------------------	------------------	-----------------------	----------------------	-------------------------

ADDITIONAL ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------	--	--------------------------	--------------------------	--------------------------

BANK & ACCOUNT NUMBER	APPROXIMATE VALUE
-----------------------	-------------------

If possible, attach any statements or additional documents to support these estimates. If you need more space, please print additional copies of this page.



YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

INVESTMENTS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
BONDS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN / ACCOUNT NUMBER APPROXIMATE VALUE

INVESTMENTS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
STOCKS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN / ACCOUNT NUMBER APPROXIMATE VALUE

INVESTMENTS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
ADDITIONAL ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN / ACCOUNT NUMBER APPROXIMATE VALUE

If possible, attach any statements or additional documents to support these estimates. If you need more space, please print additional copies of this page.



YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
------------------------	------------------	-----------------------	----------------------	-------------------------

HOUSEHOLD FURNITURE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
---------------------	--	--------------------------	--------------------------	--------------------------

DESCRIPTION	APPROXIMATE VALUE
-------------	-------------------

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
------------------------	------------------	-----------------------	----------------------	-------------------------

TOOLS/EQUIPMENT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
-----------------	--	--------------------------	--------------------------	--------------------------

DESCRIPTION	APPROXIMATE VALUE
-------------	-------------------

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
------------------------	------------------	-----------------------	----------------------	-------------------------

ANITQUES/COLLECTIONS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
----------------------	--	--------------------------	--------------------------	--------------------------

DESCRIPTION	APPROXIMATE VALUE
-------------	-------------------

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
------------------------	------------------	-----------------------	----------------------	-------------------------

JEWELRY		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
---------	--	--------------------------	--------------------------	--------------------------

DESCRIPTION	APPROXIMATE VALUE
-------------	-------------------



YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
AUTOMOBILES/VEHICLES		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DESCRIPTION APPROXIMATE VALUE

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
BUSINESS INTERESTS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DESCRIPTION APPROXIMATE VALUE

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
PERSONAL LIFE INSURANCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN & POLICY NUMBER APPROXIMATE VALUE

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
EMPLOYER LIFE INSURANCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN & POLICY NUMBER APPROXIMATE VALUE



Leaving Your Legacy

As you begin planning your legacy, we hope you will support the work of the Aga Khan Foundation USA. Meaningful change takes time, which is why we've been working in communities across Africa and Asia for decades—and will be there for generations to come. AKF's continued growth and success will require generous support from those who believe in the work we do.

By making a Planned and Legacy (PLG) gift to the Foundation, you help ensure that AKF and its sister agencies across the Aga Khan Development Network will continue improving quality of life for communities worldwide.

The best way to actualize your charitable intentions should be discussed with your attorney or financial advisor. Contact the Foundation when you are ready to develop a plan that includes AKF USA. Our staff will work with you, in confidence, to help you explore and achieve your personal, financial and charitable intentions.

You have an opportunity to make a difference.

DISCLOSURE ON ATTORNEYS AND FINANCIAL ADVISORS AND THE AGA KHAN FOUNDATION USA

Thank you for taking the time to complete this estate and gift planning workbook. Every person's estate plan is specific to them and their family. The Planned and Legacy Giving (PLG) staff at the Aga Khan Foundation will work with you to help you plan for the future. However, we are unable to offer any specific legal or financial advice for your personal situation. Your personal legal and financial advisors are best suited to help you develop your estate plan and should be contacted independently from the Foundation. Working with your attorney and financial advisor will help you develop a personalized estate plan to best fulfill your intentions and wishes.