



Prophetic WITNESS

AN FCNL PLANNED GIVING NEWSLETTER

LESSONS LEARNED

By Mary Comfort Ferrell, Planned Giving Director

IN THIS ISSUE

» Lessons
Learned

In my work as FCNL’s planned giving director, I have the privilege of listening to people as they explore their dreams for future generations and make plans to realize those dreams. I also see the positive outcomes of those plans. I am inspired every day by our network of supporters, who are determined to let their lives speak for the future. Here are two important lessons I am learning:

LESSON # 1: YOU JUST HAVE TO HAVE A WILL. AND UPDATE IT REGULARLY.

Every adult needs a will. It is your opportunity to help the people and organizations that mean the most to you and makes your intentions known. A will sorts out your investments, real estate, and taxes.

It’s not that we all don’t know this, it’s that we don’t want to think about it. Frankly, we don’t want to think about death. Yet getting a current and well-crafted will is a life-affirming task. It allows us to help the people and causes we care about beyond our own lifetimes.

I have seen the relief—and even sometimes giddy joy—that comes from getting this essential task well taken care of. It can offer us a new resolve to live our lives fully now, knowing that our plans are in good order.

And if that’s not motivation enough, let me tell you a story that may convince you what not to do:

An FCNL supporter whom I’ll call George suddenly faced surgery. He wrote his will himself in the hospital, and had it duly witnessed. I am sure George felt he

(Over)

Editor’s Note: Prophetic Witness is a new FCNL newsletter for all our supporters. It is published twice a year. Contact me if you have any suggestions regarding the format and content. Thank you for steadfastly supporting FCNL’s work. Adlai Amor, Associate Executive Secretary for Communications; adlai@fcnl.org

had clearly communicated his future desires at the time he wrote his will. The problem was that after his lifetime, no one else could figure out what he wanted to have happen.

We are grateful that George included a gift to FCNL in his will, and we consider it a basic matter of integrity to follow our donors' final wishes to the letter. But George's desires were not clear to us nor to his other heirs. Regrettably, George's estate representatives had to take his will to court. Uncertainty about his intentions caused his heirs expense and heartache and significantly delayed the plans he made.

Please. Get your will done. Update it every 5 years, or more often if you move to a new state or have a change in family circumstance. It doesn't have to be a time-consuming or expensive process. Certainly, it would have been less expensive for George to get his will done properly than the legal ordeal was for his heirs.

LESSON #2: TELL US ABOUT IT

Recently I spoke with an FCNL constituent who served as the executor of her mother's estate. We were reminiscing about her mom's activism with FCNL, and what an impact she had made in the world. I love this part of my work.

She said, "I'm really glad that Mom left FCNL that bank account."

I replied hesitantly, "What bank account?"

"Mom made you the beneficiary of her retirement account", she explained with growing agitation. "I just assumed that the bank would notify you."

The bank had not notified us, nor are they required to so by law. Did you know that retirement plan administrators, donor advised fund managers, and other account officials are not required to notify your beneficiaries?

Our donor's daughter is a very smart and competent woman, and she did a fine job as executor. But she was also a daughter who was grieving. If FCNL had known about her mother's plans, we would have been better equipped to help make the process easier for her, and to fulfill her mother's wishes in a timely manner.

If you have included FCNL in your estate plans, please let us know. When we have the information, which we keep confidential, we can be more helpful to your loved ones and to those you've entrusted with the care of your future gift. 🌿

NEXT ISSUE:

Recently I accompanied a young adult who has just named FCNL as a beneficiary of his first retirement plan. He's thinking how to let his life speak over the next 60-75 years— talk about planned giving! In the next issue of *Prophetic Witness*, we'll share more inspiring stories from FCNL's planned giving donors. Stay tuned. (And get that will done!)

ABOUT THE AUTHOR:

Mary Comfort Ferrell provides FCNL constituents with information about how you can support FCNL through



your will, estate, or with gifts that pay income for life. Mary Comfort earned an M.S. in pastoral care and counseling with a concentration in spiritual direction and served for many years as a spiritual nurturer. She sees planned giving as a special form of spiritual nurture. Mary Comfort can be reached at marycomfort@fcnl.org or (202) 903-2539.



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