

Wills Survey-

A Questionnaire to help us plan our Future Wills Program

1. How long have you been a member of _____ United Methodist Church?
2. Please check your specific age group: 20-30 ___; 30-40 ___; 40-50 ___; 50-60 ___; 60-70 ___; 70-80 ___; 80-90 ___; 90+ ___.
3. What is your family status? Single ___; Married ___; Divorced ___; Widowed ___.
4. Do you have children? ___ How many? ___ Grandchildren? ___ Number? ___.
5. Do you have a Will drawn by an attorney? Yes ___; No ___;
6. If yes, how long ago was it written or revised? Year: _____.
7. Do you have a Living Trust drawn by an attorney? Yes ___; No ___;
8. If yes, how long ago was it written or amended? Year: _____.
9. Have you included the church in your Will or Living Trust? Yes ___; No ___;
10. Would you consider including the church or church-related institutions in your Estate plans in the future? Yes ___; No ___.
11. Would you be interested in obtaining more information about Wills and/or Living Trusts? Yes ___; No ___.
12. Would you be interested in attending a Wills Seminar entitled “*Will Your Story Live On*” if it is offered by the church? Yes ___; No ___.
13. Are you familiar with the any of the following planned gift options? (Check please)

Gifts of Appreciated Stock ___; Gifts of Real Estate ___; Life Insurance Gifts ___;
Gift Annuities ___; Charitable Remainder Trusts ___; Donor-Advised Funds ___.
14. I would welcome additional learning opportunities on the basic financial and tax benefits of planned giving. Yes ___; No ___.

Your participation is deeply appreciated. Thank you.!

Please return to the attention of _____,
Endowment Committee Chair or other Designated Leader
_____ United Methodist Church, Church Address