The information in this guide and workbook is not intended to be legal or tax advice.
For more assistance, please contact your attorney or other professional advisor.
ESTATE PLANNING WORKBOOK

The workbook on the following pages is intended to guide you in collecting necessary paperwork, taking inventory of your assets and making personal decisions before you go to the professionals to create your estate plan. This resource will help you save time and money during the estate planning process because you will be prepared - and those you love will be ready, too, when they need to access your important life documents to carry out your wishes.

If you have any questions, please contact us:

Pi Kappa Phi Foundation
C/O Gateway Society
2015 Ayrsley Town Blvd Ste 200
Charlotte, NC 28273

Phone: (704) 504-0888
Fax (980) 318-5295
Email: plannedgiving@pikapp.org

The information in this workbook is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. State income/estate taxes or state law may impact your results.
## PERSONAL INFORMATION

### ABOUT YOU

<table>
<thead>
<tr>
<th>Full Name</th>
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<tbody>
<tr>
<td>Current Address</td>
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<td>Telephone Number(s)</td>
</tr>
<tr>
<td>Former Address(es)</td>
</tr>
<tr>
<td>Social Security Number</td>
</tr>
<tr>
<td>Date and Place of Birth</td>
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<tr>
<td>Location of Birth Certificate</td>
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<tr>
<td>Father’s Name</td>
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<td>Mother’s Maiden Name</td>
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<tr>
<td>Driver’s License Number and State</td>
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### MARRIAGE INFORMATION

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<tr>
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<tr>
<td>Location of Prenuptial Agreement</td>
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## WORKBOOK
### PERSONAL INFORMATION

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<th>CHILDREN INFORMATION</th>
<th>OTHER PEOPLE TO INCLUDE</th>
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<td>Relationship to You</td>
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<td>Number of Children</td>
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<td>Name</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>Date of Birth</td>
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# WORKBOOK
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<td>Other Information</td>
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<table>
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<td>Address</td>
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<table>
<thead>
<tr>
<th>Name</th>
<th>Benefits and Location of Documents</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Financial Interests</td>
</tr>
<tr>
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<td>Other Interests (stockholder, ownership)</td>
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## PERSONAL INFORMATION

### WILL INFORMATION

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<tr>
<th>Field</th>
<th>Information</th>
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<td>Location of Will Document</td>
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<tr>
<td>Date of Document</td>
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</tr>
<tr>
<td>Executor’s Name</td>
<td></td>
</tr>
<tr>
<td>Executor’s Address</td>
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</tr>
<tr>
<td>Executor’s Telephone Number</td>
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</tr>
<tr>
<td>Secondary Executor’s Name</td>
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</tr>
<tr>
<td>Secondary Executor’s Address</td>
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</tr>
<tr>
<td>Secondary Executor’s Telephone Number</td>
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<tr>
<td>Additional Notes</td>
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### TRUST INFORMATION

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<tr>
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<td>Date of Document</td>
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<td>Trustee’s Name</td>
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<td>Trustee’s Address</td>
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<tr>
<td>Trustee’s Telephone Number</td>
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<tr>
<td>Secondary Trustee’s Name</td>
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</tr>
<tr>
<td>Secondary Trustee’s Address</td>
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<tr>
<td>Secondary Trustee’s Telephone Number</td>
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</tr>
<tr>
<td>Trust will terminate when youngest child reaches age:</td>
<td>__________</td>
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<tr>
<td>Additional Notes</td>
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**Note:** The content is a table with fields for personal information and trust information. The information is organized in a clear and structured manner with placeholders for specific details such as names, addresses, telephone numbers, and dates.
## WORKBOOK
### PERSONAL INFORMATION

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<thead>
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<th>BENEFICIARY INFORMATION</th>
<th>ESTATE DISTRIBUTION</th>
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<tr>
<td>Beneficiary’s Address</td>
<td>Beneficiary’s Address</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Relationship to Beneficiary</td>
<td>Relationship to Beneficiary</td>
</tr>
<tr>
<td>Item Designated to Beneficiary</td>
<td>Amount or Percent Designated</td>
</tr>
<tr>
<td>Name of Beneficiary</td>
<td>Name of Beneficiary</td>
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<td>Amount or Percent Designated</td>
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## PERSONAL INFORMATION

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<td><strong>Funeral Instructions</strong></td>
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# WORKBOOK
## ASSET INFORMATION

### BANKING INFORMATION

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</tr>
<tr>
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<td>Account Number</td>
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<tr>
<td>Name(s) on Account</td>
<td>Name(s) on Account</td>
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<tr>
<td>Balance</td>
<td>Balance</td>
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Account types to include: Checking, Savings, Certificates of Deposit, Credit Unions, etc.
# WORKBOOK
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## WORKBOOK

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<thead>
<tr>
<th>Bank Name</th>
<th>Bank Name</th>
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<th>Number of Shares</th>
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Types of securities to consider: 9 stocks, bonds, mutual funds
### Retirement Plans

| Type of Account | Type of Account |
|-----------------|-----------------|                |
| Owner           | Owner           |
| Beneficiary     | Beneficiary     |
| Value           | Value           |
| Institution Where Account is Held | Institution Where Account is Held |

Types of retirement plans to consider: 401(k), 403(b), Roth IRA, Employee Pensions
## WORKBOOK
### ASSET INFORMATION

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<thead>
<tr>
<th>LIFE INSURANCE</th>
<th>MEDICAL INSURANCE</th>
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<td>Name of Insured</td>
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### WORKBOOK
### ASSET INFORMATION

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<td>Policy Number</td>
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<tr>
<td>Vehicle Make and Model</td>
<td>Additional Information</td>
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<td>Policy Company</td>
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<tr>
<td>Policy Number</td>
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<tr>
<td>Additional Information</td>
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*Other types of insurance policies to consider: boat and other vehicles, long-term care*
### Workbook

**Asset Information**

#### Annuities

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#### Real Estate

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<tr>
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<th>Address</th>
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<th>Mortgage Balance</th>
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## WORKBOOK
### ASSET INFORMATION

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<th>REAL ESTATE</th>
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<td><strong>Address</strong></td>
<td><strong>Value</strong></td>
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<tr>
<td></td>
<td><strong>Location of Item</strong></td>
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<tr>
<td><strong>Purchase Date</strong></td>
<td><strong>Value</strong></td>
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<tr>
<td><strong>Mortgage Balance</strong></td>
<td><strong>Item</strong></td>
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<tr>
<td><strong>Value</strong></td>
<td><strong>Location of Item</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Value</strong></td>
</tr>
</tbody>
</table>

Types of personal property to consider: jewelry, firearms, art, antiques, collections
“I am confident that Pi Kappa Phi will continue to create unique experiences for generations of exceptional leaders to come. It is our duty to ensure the fraternal experience for brothers we have yet to meet, and I personally appreciate your support in achieving this goal.”

If you are interested in learning more about planned giving opportunities at Pi Kappa Phi Fraternity, please contact us or fill out and return the following page to our office:

Pi Kappa Phi Foundation  
C/O Gateway Society  
2015 Ayrsley Town Blvd Ste 200  
Charlotte, NC 28273

Phone: (704) 504-0888  
Fax (980) 318-5295  
Email: plannedgiving@pikapp.org
Name

Address

City     State     Zip

Phone    E-mail

I would like more information about (check all applicable):

☐ Wills and Trusts
☐ Creating a Scholarship
☐ Establishing an Endowed Fund

☐ I have included Pi Kappa Phi in my estate plans. Please contact me for recognition.

☐ I would like someone to contact me about including Pi Kappa Phi in my estate.

PLEASE RETURN TO:

Pi Kappa Phi Foundation
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2015 Ayrsley Town Blvd Ste 200
Charlotte, NC 28273

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