



The Jewish Community Foundation of Greater Ann Arbor is pleased to provide you with this document as a follow-up from a presentation entitled **Assuring a Jewish Ann Arbor: Preparing to Review or Develop Your Estate Plan**, given by Alan Cotzin on 3.21.21. Created by Alan, in conjunction with Foundation/Federation staff, this questionnaire will help guide you through the process of initiating or reviewing your estate plan. The PowerPoint and a recording of this presentation can be found on the website at <https://www.jewishannarbor.org/way-to-give/planned-giving/foundation/>

Alan Cotzin is a retired Development Professional. For over 30 years, Alan worked at the University of Michigan as the Major and Planned Giving Director for Department of Surgery and Regional Director for the Southern States, and has served as a development consultant for various organizations.

Getting Started, The Chai (18) Questions!

The exercise below is designed to assist you in initiating your estate plan and/or reviewing your current plan. This activity will prepare you to meet with your estate planning professionals. It is suggested that if two of you are completing this questionnaire that you do it separately and then share and discuss your responses.

So, get your paper and pen and start!

- 1) What is on your bucket list? Travel; change of residence, e.g., warmer climate, smaller home; more experiences with family; or pursue a new interest?
- 2) What aspects of Jewish Ann Arbor have made a difference in your life and your family's life?
- 3) What organizations have you been involved with that have made the biggest impact on you and your family's life?
- 4) What are the values you wish to transmit to your family and community?
- 5) What goals do you want your estate plan to reflect, e.g., maximize funds to heirs, spend down assets, ensure gifts to charities, etc.
- 6) What is your current annual income?



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- 7) What do you anticipate your annual income will be when you retire?
- 8) How much income do you anticipate requiring annually to maintain your current lifestyle once you retire?
- 9) How do you wish to provide for your family members?
List each separately:
 - a) Who?
 - b) How much? Is there an amount/percentage that you wish not to exceed?
 - c) Do you want to give the gifts, now, in your estate or both?
 - d) Is there a purpose for the gift?
 - e) Will the recipient be responsible with your gift?
- 10) Other than family, who do wish to benefit from your estate?
List each separately:
 - a) Name of charity or person
 - b) Purpose of the gift
 - c) Amount of gift/percentage of the estate
 - d) Do you wish to be recognized and how, if at all?
- 11) Do you wish to endow any of your annual gifts such as synagogue/temple dues, Federation annual pledge or other regular gifts?
List each separately:
- 12) Are there gifts you wish to make now so you can see your philanthropy in action? You might also consider endowing this activity in your estate plan. Examples include Speaker series, scholarships, a special or regular activity of the organization, etc.
- 13) Identify family heirlooms, keepsakes, and other very special items. Ask family members what items are important to them. Designate who will receive them and when, such as art, jewelry, items that have special meaning to family or friends. Communicate as appropriate to maintain and enhance family relationships. Keep a list with your Will.
- 14) Do you wish to write an ethical will or other communication such as video or letter to your children, grandchildren and/or others?
- 15) What are your desires concerning your health care and end of life planning?



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- 16) Be sure to have completed your Power of Attorney for Finance (electronic footprint), Power of Attorney for Healthcare (Advanced Directives, HIPPA, Medical Information), and Healthcare Proxy and Power of Attorney for children turning 18.
- 17) Identify who you wish to administer your estate in your legal document.
- 18) How will you communicate your wishes to your family members, charities, and others with a need to know?

Before you sign any documents, make sure you consult with your estate planning professionals. Another helpful resource is the AARP “Personal Estate Planning Course Record Book” found [here](#).

Additional thoughts:

Questions? Please contact either:

Alan Cotzin (ph.) 734-604-2143 (email) acotzin@gmail.com

Alan created this document and the program. He considers this a work in progress and invites you to contact him with feedback and suggestions.

Eileen Freed at (ph.) 734-773-3537 (email) eileenfreed@jewishannarbor.org

Eileen Freed is the Executive Director of the Jewish Community Foundation of Greater Ann Arbor. She is happy to discuss planned giving with you or your estate planning professionals.