



Dear Friends of Door Creek Church,

A prayerfully developed estate plan can ensure your wishes honor God in the way you desire. Being a good steward includes gathering your important documents, keeping them up to date and stored in a safe place that is accessible to your personal representative and family. The following checklist provides a good starting point to reference.

May God bless you in your efforts!

[doorcreekchurch.org/foundation](http://doorcreekchurch.org/foundation)

#### FUNDAMENTALS

- Wills
- Trust documents (revocable trust, charitable trust, special needs trust, etc.)
- Letters of instruction to heirs and/or personal representative
- Durable Power of Attorney for health care
- Durable Power of Attorney for financial matters

#### HEALTH CARE

- Authorization to release health care information
- Living Will (Advance Directive)
- Do Not Resuscitate Order

#### FAMILY RECORDS

- Marital documents
- Divorce papers
- Common/Community Property Agreement
- Adoption documents
- Birth certificates

#### PROPERTY

- Housing, land, and cemetery deeds
- Mortgage and escrow accounts
- Proof of loans made and debts owed
- Vehicle titles
- Stock certificates, savings bonds
- Partnership and corporate operating agreements
- Latest tax returns

#### ELECTRONIC ASSETS

- Banking and other electronic access (logins, passwords) provided securely to heirs and/or personal representative →

### EASY ONLINE GIVING AT [DOORCREEKCHURCH.ORG/GIVE](http://DOORCREEKCHURCH.ORG/GIVE)

The Door Creek Church Foundation is a 501(c)(3) organization, which means your gift will not only make a lasting difference toward the things you value most in your lifetime, but it may also provide tax benefits to you and your family. To learn more about planned giving with DCCF, please complete the response card below and return it to:

Door Creek Church Foundation, 6602 Dominion Drive, Madison, WI 53718, or call 608-222-8586, ext. 233 (Finance Director) to discuss your options today.

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

EMAIL \_\_\_\_\_

TELEPHONE \_\_\_\_\_

I would like more information on planned giving with Door Creek Church  
Best way to contact me:  Phone  Email  Other \_\_\_\_\_

I have already included Door Creek Church in my estate plan.

**MAIL TO:**

Door Creek Church  
ATTN: Mark Felton, Finance Director  
6602 Dominion Drive  
Madison, WI 53718

**DROP OFF:**

In the offering box

**EMAIL:**

Mark Felton, Finance Director  
mfelton@doorcreekchurch.org

*Every good gift and every perfect  
gift is from above, coming down  
from the Father of lights with  
whom there is no variation  
or shadow due to change.*

*James 1:17*

**INSURANCE AND RETIREMENT**

- Insurance policies
- Retirement account documents, 401(k), IRA, etc.
- Pension documents
- Annuity contracts
- Social Security Information

**FINANCIAL ACCOUNTS**

- List of bank and brokerage/investment accounts
- List of safe deposit boxes, including location of key and who may access (name of bank/location)
- List of credit cards

**IMPORTANT CONTACTS | EMAIL & PHONE NUMBERS**

- Personal representative, family representative
- Attorney
- Accountant
- Pastor
- Ongoing service contracts/agreements
- Funeral home

**OTHER HELPFUL INFORMATION**

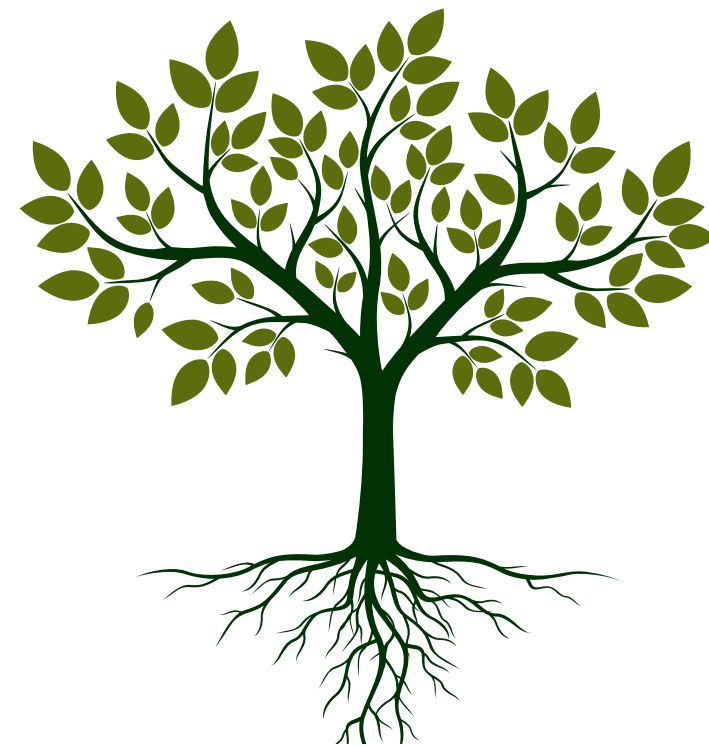
- Personal and family medical history
- Current prescription medicines
- List of medical insurance and medical care providers
- Combination to personal safe
- Military service records



**DOOR CREEK CHURCH**  
A Christ-Centered Church for All People

6602 Dominion Drive | Madison, WI 53718 | 608.222.8586

*“The earth is the Lord’s, and everything in it, the world,  
and all who live in it;” Psalm 24:1*



**Planned Giving**  
*Where to Begin...*