ALL ABOUT Home®

WLJT-TV 11

Estate Planning Guide



Introduction

Thank you for considering a legacy gift to WLJT-TV 11 West TN PBS. Your generosity and vision can help ensure that trusted PBS content, quality educational programming, and local programs continue to serve West Tennessee for generations to come.



The Importance of Estate Planning

You owe it to yourself and your loved ones to take the time to create a thoughtful estate plan. Estate planning is an important step in protecting the assets you have worked hard to build and ensuring your wishes are carried out. A well-designed estate plan can help provide financial security for your loved ones, address potential tax considerations, and allow you to support the organizations and causes that are meaningful to you.

By including WLJT-TV 11 West TN PBS in your estate plans, you can help create a lasting legacy for the people and communities of West Tennessee.

TO KNOW

When planning your estate, it's important to know that you don't have to designate specific dollar amounts to your chosen charities or beneficiaries. Instead, ***you have the option to allocate a percentage of your estate*** to each recipient, offering a flexible and dynamic way to distribute your assets.

By choosing to leave a percentage, you ensure that your estate adapts to any changes in its value over time, providing clarity and ease to your loved ones and the causes you care about.

How to Use This Record Book

Including WLJT in your estate plan can be as simple as designating a percentage of your estate as a gift to support public television. This flexible approach allows you to make a lasting impact on the future of public television while continuing to provide for your loved ones and other priorities that matter to you.

Whether you choose 1%, 5%, or more, ***every gift makes a difference and helps WLJT*** continue to provide quality programming and valuable services to our community.

A ***percentage-based bequest*** is a meaningful way to ensure your generosity becomes part of your legacy, inspiring, and enriching lives of generations to come.

1. **Complete the Forms:** Begin by clicking inside the blue boxes and typing the necessary information.

2. **Save Your Work:** To save your progress, go to the File menu and select "**Save As**." Rename the file with a unique name or include the current date, then save it to a convenient location. Saving a renamed copy allows you to reuse the original record book whenever needed.

3. **Store Safely:** Once completed, print your records and store them in a secure place, such as a safe-deposit box.



This record provides important personal and family information that can be invaluable to your executor (personal representative) when the time comes to settle your estate. It serves as a helpful guide to locating beneficiaries, safe-deposit boxes, property deeds, titles, stock and bond certificates, wills, trust agreements, and other essential documents.

Planning Your Legacy

Your record serves as an important foundation for your estate plan, helping you protect your family's future while supporting the causes and organizations that matter most to you. It provides a clear picture of your assets and what you wish your beneficiaries to inherit, encouraging you to consider how your assets will be distributed, whether through designated estate percentages, joint ownership, other legal arrangements, or provisions in your will.

If you haven't yet prepared a will, having this information organized in advance can make the process easier and help ensure your wishes are clearly documented.

TO KNOW

If you are married or partnered, you and your spouse should each prepare a separate record book. Although some sections may contain shared information, others are unique to each individual. Keeping separate records helps ensure that your personal affairs are clearly documented and makes it easier for loved ones to manage each person's affairs when the time comes.



Considering WLJT in Your Estate Plan



- **Bequests:** Include WLJT in your will or living trust by designating a specific dollar amount, a percentage or remainder of your estate, or a particular asset.

- **Retirement Plans and IRAs:** Name WLJT as a beneficiary of your retirement account or IRA. You can designate a specific percentage of your account as a meaningful gift while potentially reducing the tax burden on your heirs.

- **Life Insurance Policies:** Name WLJT as a full, partial, or contingent beneficiary of your life insurance policy, allowing you to make a lasting contribution though a policy you already own.

Station Legal Name: West Tennessee Public Television Council, Inc. D/b/a WLJT-TV/West TN PBS

Station Tax ID: 62-1177950

Benefits of Including WLJT In Your Plans

- **Legacy:** Your gift helps ensure that future generations can continue to enjoy and benefit from the educational, cultural, and community programming that WLJT provides.

- **Tax Advantages:** Charitable gifts may help reduce real estate taxes and may offer additional tax benefits.

- **Simplicity:** Including WLJT in your estate plan is often straightforward and can be updated as your wishes, priorities, or circumstances change.

Your Legacy at WLJT

Your planned gift is a testament to your values and your belief in the power of public television. We honor our legacy donors through our recognition program, ensuring that your commitment to WLJT is celebrated now and in the future.

Next Steps

1. **Consult with Your Advisors:** Work with your financial or legal advisors to determine the best way to include WLJT in your estate plans and the giving option that best aligns with your goals.

2. **Communicate Your Intentions:** Inform WLJT of your plans so we can ensure your wishes are understood and followed.

3. **Document Your Gift:** Use our sample bequest language, you can find on our website at https://www.westtnpbs.org/planned-giving/.

The information you include in this booklet is important. Please complete the booklet as thoroughly as possible. The information you gather in advance of your meeting with an advisor will help him or her assess your specific needs and create a plan that meets your goals for protecting your family and assets.

Be sure to keep this booklet in a private place as it contains confidential information.

1. PERSONAL INFORMATION

Full Name _____

Street Address _____

City _____

State _____ Zip _____

Home Phone Number _____

Cell Phone Number_____

E-mail Address_____

Date of Birth_____

Social Security Number _____

U.S. Citizen? ☐ Yes ☐ No

Veteran? ☐ Yes ☐ No

If yes, please list branch and dates of service

_____

_____

If not a Veteran, was your former spouse a Veteran? ☐ Yes ☐ No

If yes, please list branch and date of service

_____

_____

Spouse Name (IF APPLICABLE) _____

_____

Street Address _____

City _____

State _____ Zip _____

Home Phone Number _____

Cell Phone Number_____

E-mail Address_____

Date of Birth_____

Social Security Number _____

Occupation/Employer _____

U.S. Citizen? ☐ Yes ☐ No

Veteran? ☐ Yes ☐ No

If yes, please list branch and dates of service

_____

Have you ever had a will or trust?

Will? ☐ Yes ☐ No

Trust? ☐ Yes ☐ No

2. MARITAL INFORMATION

Date of Marriage _____

Place of Marriage _____

City _____

State or Province _____

Country _____

3. CHILDREN (IF APPLICABLE, INCLUDE ADULT AND MINOR CHILDREN, AS WELL AS ANY WHO HAVE PREDECEASED YOU)

1. Name of Child _____

☐ Male ☐ Female

☐ Married ☐ Single

Street Address _____

City _____

State _____ Zip _____

Date of Birth _____

Phone Number _____

Relationship

☐ Natural child ☐ Adopted

☐ Stepchild ☐ Deceased

Relationship to Spouse

☐ Natural child ☐ Adopted

☐ Stepchild ☐ Deceased

2. Name of Child _____

☐ Male ☐ Female

☐ Married ☐ Single

Street Address _____

City _____

State _____ Zip _____

Date of Birth_____

Phone Number _____

Relationship

☐ Natural child ☐ Adopted

☐ Stepchild ☐ Deceased

Relationship to Spouse

☐ Natural child ☐ Adopted

☐ Stepchild ☐ Deceased

3. Name of Child _____

☐ Male ☐ Female

☐ Married ☐ Single

Street Address _____

City _____

State _____ Zip _____

Date of Birth_____

Phone Number _____

Relationship

☐ Natural child ☐ Adopted

☐ Stepchild ☐ Deceased

Relationship to Spouse

☐ Natural child ☐ Adopted

☐ Stepchild ☐ Deceased

4. Name of Child _____

☐ Male ☐ Female

☐ Married ☐ Single

Street Address _____

City _____

State _____ Zip _____

Date of Birth _____

Phone Number _____

Relationship

☐ Natural child ☐ Adopted

☐ Stepchild ☐ Deceased

Relationship to Spouse

☐ Natural child ☐ Adopted

☐ Stepchild ☐ Deceased

☐ Please check this box and attach a separate page to list additional children.

Do any of your children have physical or mental special needs?

☐ Yes ☐ No

If yes, explain _____

_____

_____

_____

Have you made gifts to one or more of your children that you wish to treat as an advancement of their inheritance? If yes, please provide information.

☐ Yes ☐ No

If yes, explain _____

_____

_____

4. GRANDCHILDREN (IF APPLICABLE)

1. Name of Grandchild _____

☐ Male ☐ Female

☐ Married ☐ Single

Street Address _____

City _____

State _____ Zip _____

Date of Birth _____

Phone Number _____

Name(s) of Grandchild's Parent(s) or Guardian(s) _____

Is this grandchild a direct descendant (natural or adopted) child of your child?

☐ Yes ☐ No

2. Name of Grandchild _____

☐ Male ☐ Female

☐ Married ☐ Single

Street Address _____

City _____

State _____ Zip _____

Date of Birth _____

Phone Number _____

Name(s) of Grandchild's Parent(s) or Guardian(s) _____

Is this grandchild a direct descendant (natural or adopted) child of your child?

☐ Yes ☐ No

Do any of your grandchildren have physical or mental special needs?

☐ Yes ☐ No

If yes, explain _____

_____

_____

Have you made gifts to one or more of your grandchildren that you wish to treat as an advancement of their inheritance? If yes, please provide information.

☐ Yes ☐ No

If yes, explain _____

_____

_____

☐ Please check this box and attach a separate page to list additional grandchildren.

5. LONG-TERM CARE INSURANCE

Do you have Long-term Care Insurance?

☐ Yes ☐ No

If yes, please provide a copy of the policy to your advisors.

6. MISCELLANEOUS

1. Do you have any legal issues your advisor should be aware of?

☐ Yes ☐ No

If yes, explain _____

_____

_____

_____

2. Where do you store your important papers?

_____

_____

3. Have you prepaid your burial and funeral arrangements?

☐ Yes ☐ No

If yes, please provide copies of your cemetery deed and funeral contract.

4. Are there any difficult family dynamics that could impact your planning?

☐ Yes ☐ No

If yes, please provide information _____

_____

_____

_____

5. Does anyone in your immediate or extended family have special need issues (including any spouses or your children)?

☐ Yes ☐ No

If yes, name and relationship of disabled family member _____

_____

7. ASSET INFORMATION

It's helpful to have assets and beneficiary information completed prior to visiting with an attorney. The sections below will help you prepare.

A. REAL PROPERTY (IF NONE, WRITE "NONE")

1. Type* _____

Location (Description) _____

_____

_____

Record owners_____

_____

How and when acquired _____

_____

Cost (Basis) _____

Market Value_____

Mortgage Bal._____

How Title Held_____

Insurance Company_____

2. Type* _____

Location (Description) _____

_____

_____

Record owners_____

_____

How and when acquired _____

_____

Cost (Basis) _____

Market Value_____

Mortgage Bal._____

How Title Held_____

Insurance Company_____

*residence, rental, time share, vacant land, oil and other mineral interests

☐

Please check this box and attach a separate page to list additional real property.

PLANNING NOTE - If your home is your primary asset and you have charitable intentions, ask your advisor about how a Retained Life Estate can help you give now, avoid probate, and stay in your home for the rest of your life.

B. CASH & BANK ACCOUNTS (IF NONE, WRITE "NONE")

1. Name of Bank/Branch _____

_____

Account Number _____

Account Type* _____

Balance/Value _____

How Title Held**_____

Beneficiary(ies) _____

_____

2. Name of Bank/Branch_____

_____

Account Number _____

Account Type* _____

Balance/Value _____

How Title Held**_____

Beneficiary(ies) _____

_____

*Savings, certificate of deposit, checking, other

**Joint, survivorship, trust, custodial

PLANNING NOTE - If you have charitable intentions and wish to avoid probate, it's possible to name a charitable organization, like your local station, as a beneficiary of your checking, savings and other accounts.

C. STOCKS & BONDS (IF NONE, WRITE "NONE")

1. Name of Institution_____

_____

Account Type _____

Current Value _____

Owner_____

Beneficiary(ies) _____

_____

2. Name of Institution _____

_____

Account Type _____

Current Value _____

Owner_____

Beneficiary(ies) _____

_____

PLANNING NOTE - If you have charitable intentions and wish to avoid probate, it's possible to name a charitable organization, like your local station, as a beneficiary of your brokerage accounts.

D. RETIREMENT ACCOUNTS

(IRAS, 401(K), ANNUITIES, KEOGHS, ETC.)
(IF NONE, WRITE "NONE")

1. Name of Institution_____

_____

Account Number _____

Owner_____

Beneficiary(ies) _____

_____

Date Established _____

Current Value _____

2. Name of Institution _____

_____

Account Number _____

Owner _____

Beneficiary(ies) _____

_____

Date Established _____

Current Value _____

PLANNING NOTE - An individual named as beneficiary of a retirement account must generally pay taxes on the gift. You can avoid this unfavorable consequence by naming a qualified charitable organization, like your local station, as a beneficiary of your retirement account.

E. LIFE INSURANCE
(WHOLE LIFE, TERM, ACCIDENTAL/ TRAVEL, ETC.)
(IF NONE, WRITE "NONE")

1. Name of Institution_____

_____

Account Number _____

Owner _____

Beneficiary(ies) _____

_____

Date Established _____

Current Death Benefit _____

Cash Value _____

Type of Policy* _____

2. Name of Institution _____

_____

Account Number _____

Owner _____

Beneficiary(ies) _____

_____

Date Established _____

Current Death Benefit _____

Cash Value _____

Type of Policy* _____

*Term, Whole/Universal, Accidental/Travel, Other

PLANNING NOTE - If you have a policy that is no longer needed, consider donating it to a qualified charitable organization, like your local station. You can donate it outright or later by naming the charity as your beneficiary.

F. VEHICLES (IF NONE, WRITE "NONE")

1. Make _____

Model _____

How titled _____

State of Registration _____

Estimated Value _____

Insurance Company _____

2. Make_____

Model _____

How titled _____

State of Registration _____

Estimated Value _____

Insurance Company _____

G. OTHER PERSONAL PROPERTY

Household Goods _____ $

_____

Art & Antiques _____
$

Books & Collectibles _____ $

Jewelry & Gems _____ $

Other _____ $

Other _____ $

H. SAFE DEPOSIT BOX (IF NONE, WRITE "NONE")

Location and how registered_____

_____

_____

I. RIGHTS OR INTERESTS IN TRUSTS, ESTATES, OR PROSPECTIVE INHERITANCES

(IF NONE, WRITE "NONE")

Describe or give the name of any Trust in which you have an interest, or the person who is the source of the inheritance and what you expect to receive. Please provide a copy of the Will or Trust that creates the interest, if available.

_____

_____

_____

_____

J. BUSINESS INTERESTS (IF NONE, WRITE "NONE")

If you and/or a spouse have any ownership in a business please provide additional information regarding the nature, interest and value of the business interest. If there are business documents, please provide copies to your advisor(s).

_____

_____

_____

_____

K. MISCELLANEOUS (IF NONE, WRITE "NONE")

If you and/or your spouse have any property interest not described above, please explain the nature of the interests and the estimated value of each._____

_____

_____

_____

8. Advisors

Personal Attorney _____

Company Name _____

Address_____

_____

Phone Number _____

Financial Planner _____

Company Name _____

Address _____

_____

Phone Number _____

Accountant _____

Company Name _____

Address _____

_____

Phone Number _____

Life Insurance Agent _____

Company Name _____

Address _____

Phone Number _____

Funeral Home _____

Firm Name _____

Address _____

_____

Phone Number _____

9. SELECTING FIDUCIARIES

Will Selections

Executor or Co-Executor _____

_____

1st Successor(s) _____

_____

2nd Successor(s) _____

_____

Trustee or Co-Trustees _____

_____

10. FINANCIAL GENERAL POWER OF ATTORNEY

Agents or Co-Agents _____

_____

1st Successor(s) _____

_____

2nd Successor(s) _____

_____

If more than one Agent is selected, may either Agent act alone, independently of the other Agent, or must all Co-Agents act together?

☐ Yes, my Co-Agents may act independently of each other.

☐ No, each task must be undertaken jointly by all Co-Agents.

Healthcare Power of Attorney & Living Will

Agents or Co-Agents _____

_____

1st Successor(s) _____

_____

2nd Successor(s) _____

_____

☐ Yes, my Co-Agents may act independently of each other.

☐ No, each task must be undertaken jointly by all Co-Agents.

11. PHYSICIANS AND HEALTHCARE PROVIDERS

Please provide the physican(s) you would like your advisors to provide your healthcare documents.

Primary Physician_____

Address_____

_____

Phone Number _____

Specialty Physician _____

Address_____

Phone Number _____

Other Physician_____

Address_____

Phone Number _____

12. GUARDIANS OF MINOR CHILDREN

The surviving parent of a minor child is ordinarily entitled to be the guardian of that child. However, a person should be selected to serve as a guardian for a minor child in the event of the simultaneous death of both spouses or the death of a single parent. It is advisable to make sure that the proposed guardian is willing to serve in that capacity. The guardian will also hold the monies for the minor children unless an alternative is expressed in the will. Parents who serve as the guardian of an adult child should seek legal counsel on the appointment of a successor guardian.

Provide the following information about the person(s) you select to be Guardian(s)/ Trustee(s).

Primary choice for Guardian/Trustee

Full Name _____

Relationship _____

Secondary choice for Guardian/Trustee

Full Name _____

Relationship _____

Are there any beneficiaries with special needs, or receiving Social Security Disability Insurance (SSDI), or Supplemental Security Income (SSI)? Provide relevant details below.

Estate Planning is an Ongoing Process . . .

It is important to revisit your plans as life changes. Major milestones, such as welcoming a new family member, changes in your financial circumstances, or shifting priorities, may affect your plans and wishes. Take time to review and update this booklet periodically to ensure your information remains accurate and reflects your current situation.

As you continue planning for the future, we invite you to consider including WLJT in your estate plans. While providing for yourself and your loved ones should always come first, a planned gift to WLJT can offer meaningful benefits while creating a lasting legacy for future generations.

Income Tax Benefits: Contributions to a qualified charitable organization like WLJT may qualify for an income tax deduction, depending on the type of gift and your individual tax situation.

Capital Gains Tax Savings: Donating appreciated assets, held for more than a year, may reduce or eliminate capital gains taxes, while also qualifying for an income tax deduction based on the assets' fair market value.

Lifetime Income: Certain planned gifts can provide you with a steady income throughout your life.



After Completing Your Estate Planning Record Book . . .

You will be prepared to meet with your attorney and other advisors to finalize your plans and prepare any necessary documents. If you have questions about your estate plans, we encourage you to consult with your advisors. They are also welcome to contact us with any questions about how you can leave a legacy to support WLJT.

We hope you'll consider making a gift to WLJT as part of your planning. The beauty of a planned gift is that it prioritizes your needs first, and depending on the type of gift, it can offer benefits such as:



- **Leaving a Legacy**
- **Income Tax Benefits**
- **Lifetime Income**
- **Reducing or Eliminating Capital Gains Taxes**
- **Personal Fulfillment**

Contact Us

For more information about including WLJT-TV 11 West TN PBS in your estate plans or exploring planned giving opportunities, please contact us at 731-881-7561 or email us at donor@westtnpbs.org.

Or for personal support, contact:



Peter Noll

WLJT President & CEO

pnoll@westtnpbs.org

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