BCRF BREAST CANCER RESEARCH FOUNDATION

# Legacy Giving: Checklist

## Ready to get started?

Below is a checklist to help you make sure your long-term planning is on track.

- ☐ Consider the impact you would like to make through your philanthropy.
- ☐ Review your estate planning documents any time there is a birth, marriage, death, new tax law, or a change in residence and at least every 5 years.
- ☐ Confirm that the executor named in your will is still the person or entity you want managing your estate.
- ☐ Ensure your beneficiaries are the ones you would like to help carry on your legacy.
- ☐ Make sure your power of attorney and health care proxy are current.
- ☐ Verify that your healthcare directive and living will reflect your wishes and that the person you name as your health care proxy will carry out those wishes.
- ☐ Ensure that the guardian named in your will is someone you are comfortable with caring for your dependents and make sure you have spoken to them ahead of time.

## Need Help?

**For Legacy Giving: Contact Amanda Johnson**

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