Estate Design Service

This month, I want to focus on a complimentary service of the Dallas Seminary Foundation—the **Estate Design Service.** This service is meant to help you consider your personal legacy in a way that accomplishes your goals efficiently and in a meaningful and God-honoring way.

This is how it works. We will gather information from you about your family and loved ones along with a basic inventory of your property. We will also discuss the goals and objectives you would like to achieve so that we can evaluate your situation and prepare a memorandum of options for your consideration.

Together we will assist in areas such as the following:

- Reducing taxes and other costs
- Maximizing resources for family and ministry
- Outlining efficient ways to fund your charitable gifts
- Creating a plan with lasting meaning and significance

What the Estate Design Service offers you:

A scriptural approach to estate planning (Paradigm Shift)

- **Values-Focused** – Planning as a steward vs. an owner; relational vs. transactional; people vs. property; eternal vs. temporal.
- **God-Centered** – Inviting God into the process and considering His wishes. Discovering and implementing God's plan of stewardship for you, as you understand it.
- **Spiritually Invigorating** - Uncovering practical ways for making the process a spiritual exercise.
- **Relationally Engaging** – Finding meaning and joy through engaging with God and with God's people for His purposes.

An efficient approach to ministry investing

- Trade tax dollars for ministry support.
- Maximize ministry gifts with little to no reduction in bequests to family (if desired).
- Understand all planning options in order to make wise, informed decisions.

A practical approach to legacy planning

- Identify godly values to guide decision-making that aligns with family mission.
- Consider ways to use temporal resources to impact eternal souls.
- Determine the way in which you would like to be remembered.

A service-related approach for stewarding DTS gifts. Dallas Seminary Foundation can …

- Provide suggested language and Tax ID;
- Discuss designation options you may wish to consider;
- Assist in honoring or memorializing a loved one;
- Serve as a conduit for the distribution of all ministry gifts;
- Handle the administration of your Donor Advised Fund or Scholarship, if applicable;
- Help in identifying a local attorney and other advisors, if needed; and
- Honor and thank you through membership in the Lewis Sperry Chafer Legacy Society.

Please be advised, the Estate Design Service is not …

- A legal document that you can sign in order to enact your plan.
- A comprehensive estate plan aimed at addressing all related matters.
- A substitute for an attorney or other professional advisors.
- A method for dictating your distribution decisions.

Plans fail for lack of counsel, but with many advisers they succeed. (Prov. 15:22 NIV)

The Estate Design Service will provide you with the following:

- A "blueprint" of sorts for the actual PLAN
- Preparation for work with your attorney and other advisors
- Planning options you likely will not hear elsewhere
- An exercise for engaging on a spiritual level
- Supplemental guidance to round out counsel from others on your advisor team

If you want to experience God, find where He's working, and join that.

—Henry Blackaby, Experiencing God

What is Important to You and Your Legacy?

1. What does wealth mean to you?
2. What do you stand for? What are your values? What are you passionate about?
3. How might you wish to communicate your beliefs and values through your estate plan?
4. How do you envision involving others in exemplifying these values?
5. How might you use temporal resources to accomplish eternal outcomes?
6. How do you hope to impact others for good in the near term as well as the long term?
7. What do you hope your estate plan will accomplish?
8. What do you sense God's plan of stewardship is for you?