

## RELATIVE DISINHERITANCE

A few years ago a seventy-five year old man came to my office and said he would like to leave his estate to help children who came to our child-guidance clinic. He was a client when he was a child and he wanted other children to receive the help they needed. I asked him about his relatives and he said he had no wife, no children and his other relatives didn't like him ... and he didn't care much for them either. So, he wanted to plan a way to disinherit them.

I said that could be done by a simple codicil to his will. He had no will so that meant obtaining a lawyer to help him write his will. He said he would do that.

I asked him if he would like to establish a named endowment account through his will and he said he would like to have people remember him as one who left a Legacy of caring for children with emotional needs. I said we could do that and I developed a gift agreement to that effect.

One day, several years later, he called to say he was going to pick out his casket and plan his departure from this earth. He said he didn't want to do it alone and asked if I would go with him. It was then that I realized he didn't have any friends. How sad, to end one's life alone, without family and friends. He said he didn't want a funeral because no one would come anyway. When he passed away, I followed the hearse to the cemetery and mine was the only car in the procession. The funeral director and I were the only ones present at his burial.

His attorney was his personal representative and his earthly possessions were sold and last expenses paid. When the charity I represented received the final disposition, it amounted to over \$250,000! This established the endowment in his name and every year \$12,500 will help provide counseling for children with emotional issues.

Was he happy about his estate plan? A definite "yes!" Today, his gift lives on in his memory.

During his last years, we always invited him to our "thank you" luncheons for persons who had planned estate gifts to the organization. He never attended, so I would later treat him to lunch as a reminder that we appreciated his future gift. I guess the organization became his "family" and I his friend.

Perhaps you have been thinking of creating a Legacy for one or more organizations in Carver County. You could do that through *The Community Foundation for Carver County*. Please consider calling or e-mailing me to set a time for a visit to begin planning your future estate gift. Your Legacy could be established through your will with a percentage of your estate or with a fixed amount to accomplish your philanthropic goals. It could be done with life insurance you no longer need for protection. It could be done with a life-income gift now to provide you and/or a loved one with increased retirement income. Whatever method, I am here to help you explore the many options available.

The Foundation is offering a free **Guide to Distributing Your Estate**. For your free no-obligation copy please call (952) 250-5138 or Email [info@carvercountyfoundation.org](mailto:info@carvercountyfoundation.org).

I look forward to hearing from you.

Learn more about the Foundation at:  
[www.carvercountyfoundation.org](http://www.carvercountyfoundation.org).



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