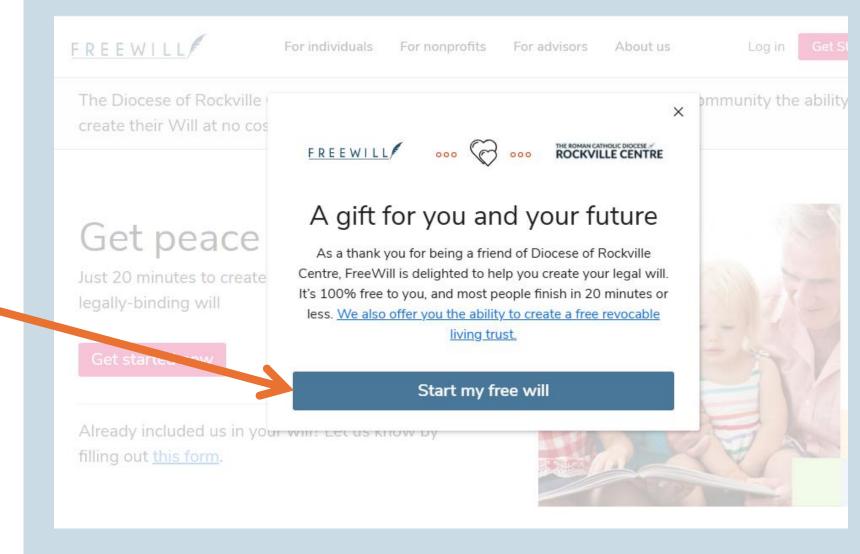


FREEWILL.com/DRVC MANUAL AND INSTRUCTIONS



Step 1: CLICK ON

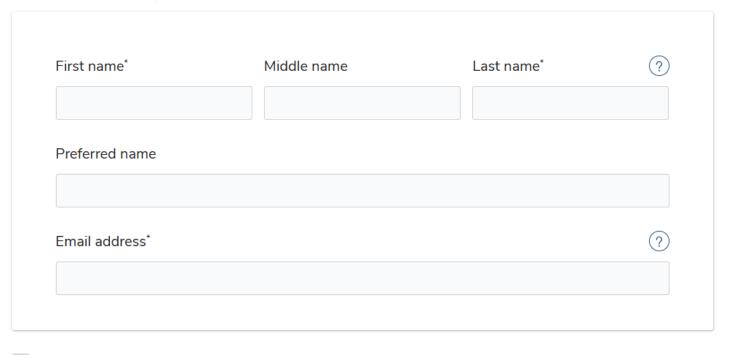
Start my free will



You will be asked to enter your name and email address to create your free account.

Getting started

Fields marked with * are required.



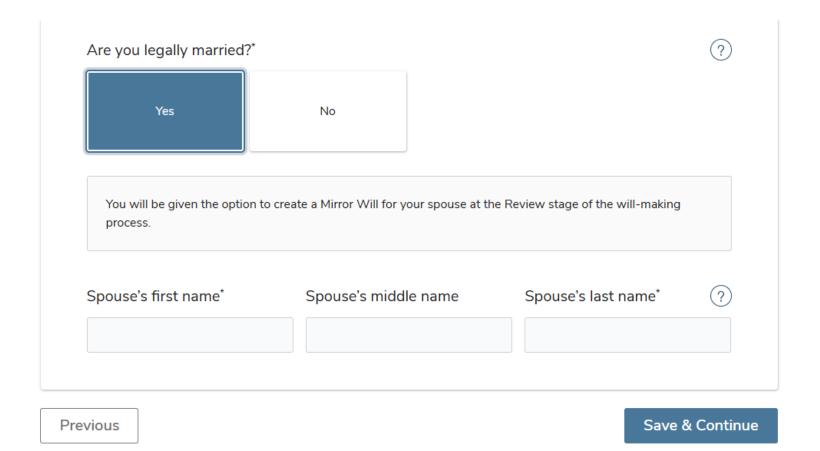
By checking this box, I confirm that I am at least 18 years of age, and that I have read and agree to FreeWill's Terms of Service &

Additional information required to facilitate your Will.

Basic details

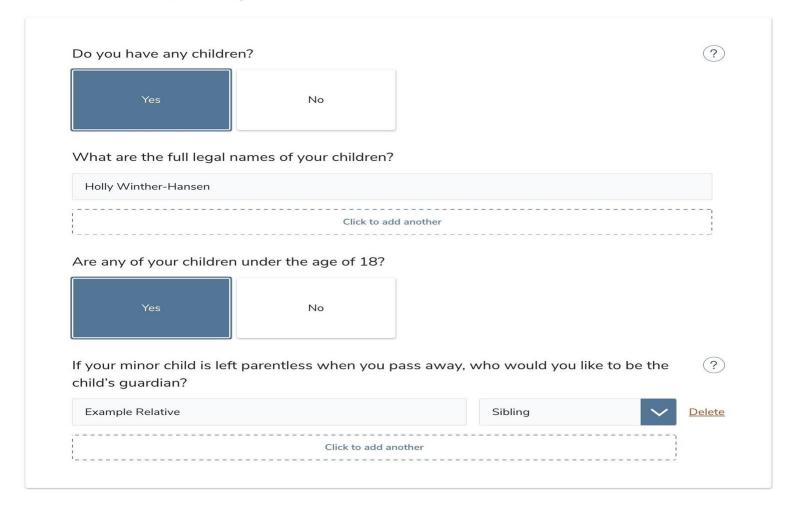


You'll be asked your marital status, and to name your spouse. Later in the process, you'll have the option to create a mirror will for your spouse if you wish. Mirror wills are two wills that are almost entirely identical to one another. They're most commonly used by married couples who have similar wishes for their property after they pass away. If your spouses's wishes are similar to your own, you can mirror your will for them, which can make the will-writing process more efficient for both of you.



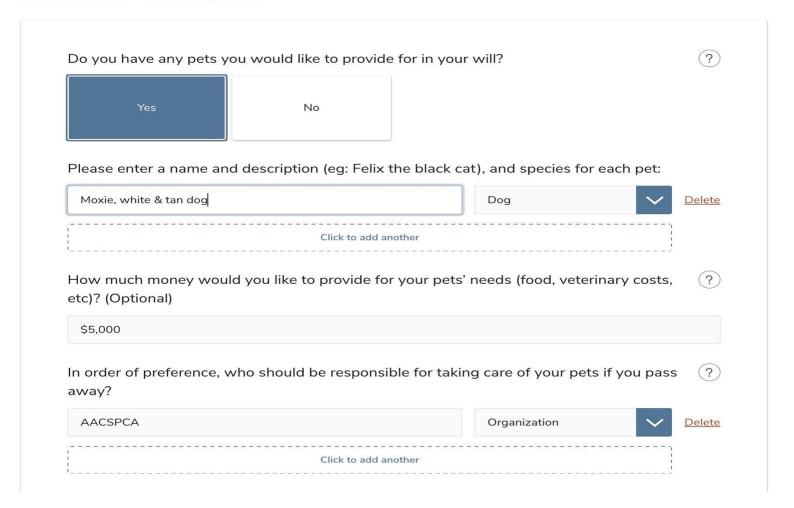
The next section asks about dependent children, so you can provide for their care, if needed.

Children and Guardianship of Minors



This section does the same for your pets, ensuring a plan for their care upon your passing.

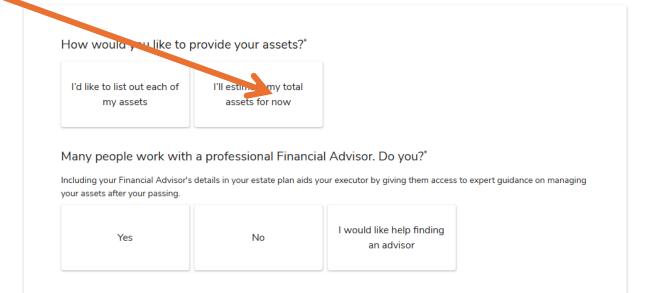
Pet Care and Pet Caretakers



You will be asked to list your assets or do an estimate of your estate depending on your circumstances.

Assets

Listing out major assets helps your executor better handle your affairs by providing information about what assets you have and where they're held. This section may take a while but is completely optional. You can choose to skip this section and return to it later.



If you choose to estimate your estate – you will be brought to this page.



What is the approximate total value of assets distributed by your will?

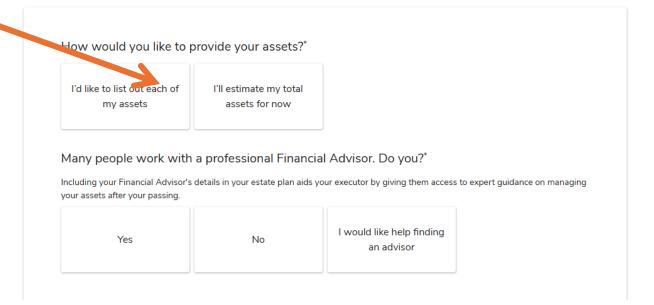
This question helps us understand your estate value in relation to state and federal tax law. We may provide additional guidance throughout your estate planning process depending on your response. This estimate should not include any assets distributed ou of your will (e.g. Joint accounts, 401(k) accounts, life insurance, etc.).

Less than \$200k	\$200K-\$500K	\$500K-\$1M	\$1M-\$2M
\$2M-\$5M	\$5M-\$10M	More than \$10M	

If you choose to list your assets (recommended) you click here

Assets

Listing out major assets helps your executor better handle your affairs by providing information about what assets you have and where they're held. This section may take a while but is completely optional. You can choose to skip this section and return to it later.



Here is the Page where you will list your assets

Assets distributed by your will (probate)

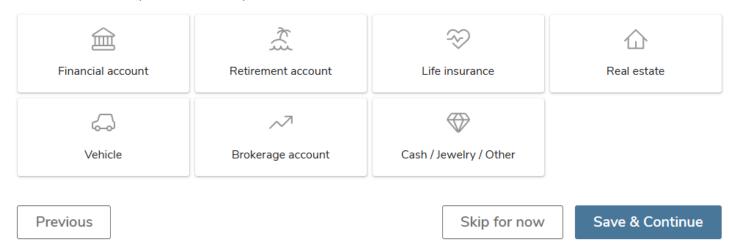
- · Bank accounts solely owned by you
- Real estate solely owned by you or by tenants in common
- · Brokerage accounts solely owned by you
- Personal property or valuables

Assets NOT distributed through your will (non-probate)

- · Jointly owned bank or brokerage accounts
- · Jointly owned real estate or vehicle
- 401(k) accounts, pensions, IRAs, etc.
- Life insurance

Select an asset to add

Add details for each asset you want to include in your will.



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You'll be given the option to leave a gift to your Parish, the Diocese or a Ministry through the Catholic Ministries Appeal.

Leave a gift to Diocese of Rockville Centre

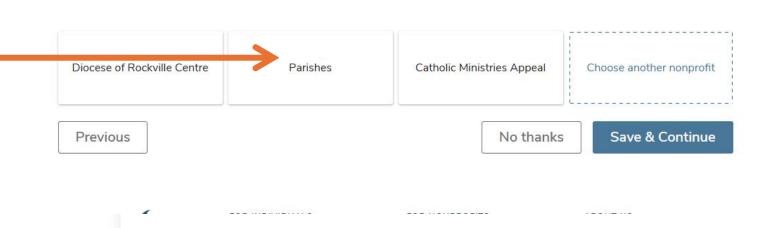
FreeWill is free to you because of the support of organizations such as Diocese of Rockville Centre that work on meaningful issues. Will you consider leaving a gift in support of a cause that is important to you? Click 'No thanks' if you don't want to leave any gifts to charity at this time.

Alongside bequests to your loved ones - and only after they are provided for - you can name your parish or diocese to receive a gift. You have the flexibility to make your gift as a set dollar amount or a percentage of your assets.



The Parish button will drop down for you to pick your Parish.

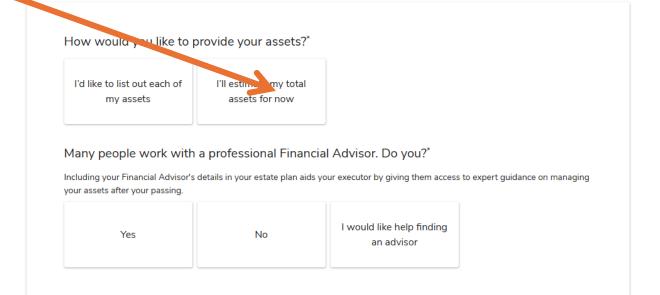
You will also have the opportunity to leave a gift to any other legal charity.



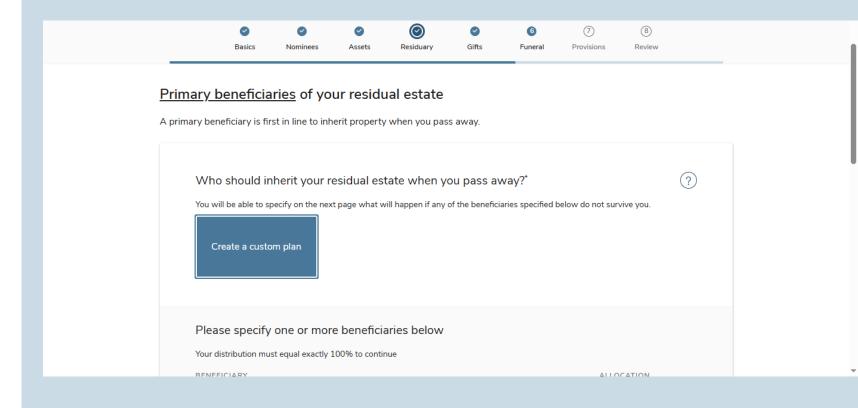
You will be asked to list your assets or do an estimate of your estate depending on your circumstances.

Assets

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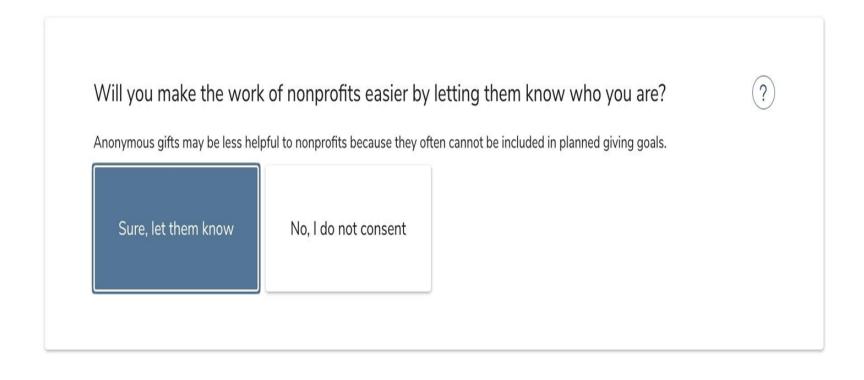


Here is where you will create your plan for your beneficiaries.



You will be asked whether you'd like your name shared with the nonprofits you included in your plan. If you want to inform us of your gift commitment, you'll want to click, "Sure, let them know." If you choose "No, I do not consent" your gift will be included in your will, but will not be informed of your gift intention.

Notifying us and other charities you care about gives us the opportunity to welcome you to our Manus Christi legacy society.



You will have the opportunity to detail your wishes for your funeral and final resting place. In this section there is also a link to resources that we recommend you review.

Funeral Wishes

Here you can choose to include wishes for your funeral and final resting place. The wishes you enter will provide instructions to your funeral executor, but please note that they will not be legally binding. It is recommended that you keep these instructions separate from your estate planning documents, as these instructions usually need to be acted upon quickly prior to asset distribution.

Full name of first choice		Relationship	
			∨ <u>Delet</u>
	Click to add anoth	er)
Mhat are your wishes	for your funeral service?		
,	•		
	ic Sacraments: It is a good idea to provide yo e sick and viaticum. You may also want to ha	•	
acraments like anointing of the	•	ve a checklist that goes over your wishes ass and whether you want masses and p	

Here is the Resource page that you can review ahead of time at:
https://www.stewardshipli.org/planned-giving

Catholic Life Planning Resources

Planning for the future is an act of faith, hope, and love. The following Catholic resources are here to support you in making thoughtful decisions that reflect your values—offering spiritual, practical, and pastoral guidance to care for yourself and your loved ones in light of our shared faith.

- United States Conference of Catholic Bishops' (USCCB's) End of Life resources (<u>click here</u>)
- 2. Sacramental Wishes Statement (PDF) (click here)
- 3. Manus Christi Legacy Society (click here)
- 4. Catholic Cemeteries Long Island (click here)



After you complete the process, you'll have the chance to review all of your responses, and easily jump back into any sections you'd like to edit.

If everything looks good to you, you can "Save and continue" to finish the process

Review your responses

Please review everything on this page to make sure it is in accordance with your wishes. If you would like to change anything, click the "Edit" button on the corresponding section.

Basic Information	
WILLMAKER NAME	LaurenTEST Winther-HansenTEST
WILLMAKER NAME	Lauren (ES) Winther-Hansen (ES)
WILLMAKER GENDER	Female
SPOUSE NAME	David Winther-Hansen
MARITAL STATUS	Married
ADDRESS	123 Test St Washington, DC 20001
APPROX. VALUE OF ASSET TRANSFER	\$1M - \$2M
	Edit

CHILDREN	Holly Winther-Hansen	
ARE ANY CHILDREN MINOR?	Yes	
GUARDIANS		
GUARDIANS	Example Relative	

At this point, your plan is fully drafted.

You can easily download your will for easy printing and saving, or you may email your will to yourself, a loved one, or your attorney.

We also offer suggestions for how to pair your drafted plan with an attorney if you wish, or to notify your nominees, like your chosen executor or personal representative.

Last will & testament

Your will is ready to be made official! Download a PDF or, if you already have a verified account on FreeWill, email a copy to yourself. Once you've printed it out, just follow the included instructions to sign and finalize it.

Download your will

Email your will

Prefer to see an attorney?

<u>Download a point summary of your will</u> to review with an attorney. This can save you both time and money!

Resources

- Reasons you might want an attorney
- American Bar Association Attorney Finder
- ACTEC Fellow Search
- Avvo
- Our FreeWill Fellows

Looking for a better way to support your favorite nonprofits now?

Giving stock is one of the most tax-advantageous ways to give during your lifetime. Your gift can be up to 20% larger because you avoid capital gains tax and most donors can also claim an income tax deduction for the stock's full market value. It's a win-win way to support the causes you love!

Learn more about charitable stock donations

Notify nominees

We'll send an email to the nominees named in your will summarizing their roles and responsibilities.

Enter nominee emails

Sign your will in front of your witnesses

You and your witnesses must sign and date your will in the same session. Then store it somewhere safe and let your executors know where they can find it.

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Your downloaded Will document includes cover sheets with easy next steps to execute your will and make it legally binding. If you have any questions during or after the process, please call anytime and we will walk you through it.

516-678-5800 ext. 296

