



Action Against Hunger USA  
One Whitehall Street, 2nd Floor  
New York, NY 10004

212.967.7800  
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## GET ORGANIZED CHECKLIST

It's never too early to get your plans in place, as this is the only way to ensure that your loved ones are taken care of and your wishes are followed, no matter what the future holds. This time of the year can be a great time to take stock of your important documents and check that your plans are complete and up to date.

In addition to protecting yourself, your family and your assets, planning for the future can also include establishing your legacy for the causes you care deeply about, like saving the lives of children and families with a [gift to Action Against Hunger in your will, trust or other estate plans](#).

You can [visit our website here](#) or contact us directly to learn more about this impactful way to help end world hunger. In the meantime, use this helpful checklist to see which estate planning documents you may need to work with your attorney to create or update this year:

### CHECKLIST OF IMPORTANT DOCUMENTS:

Although it's vital to seek legal advice to determine which legal documents you will need to accomplish your personal and financial goals, the following are generally recognized as the five main components of an estate plan:

#### Will or Trust

A will and/or trust provides instructions as to who will receive your assets after your lifetime. While your attorney can recommend which would be best for your needs, the only way to ensure that your preferences for your home and other assets are followed is to engage in estate planning that includes one or both of these critical legal documents.

#### Durable Health Care Power of Attorney

A power of attorney is simply a document that provides someone of your choosing with legal authority to make decisions on your behalf. With a durable health care power of attorney, you name a trusted loved one to make medical decisions for you in case you become incapacitated and cannot make them for yourself. This document is essential for ensuring that you do not have a court-appointed guardian make these important choices for you instead.

#### Durable Financial Power of Attorney

As with a health care power of attorney, a durable financial power of attorney also provides decision-making authority to someone you choose. With this document, however, you give a family member or friend the ability to make decisions relating to your personal finances. This can be critical to have in place



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to make sure your bills are paid and that you avoid negative financial consequences should you become incapacitated.

#### **Advance Directive (Living Will)**

An advance directive, also known as a “living will,” is necessary to document your wishes for end-of-life care. Having an advance directive in place is the only way to ensure that your preferences will be followed regarding different medical interventions at that time.

#### **Beneficiary Designations**

Beneficiary designations can be found or added to most retirement plans, IRAs, brokerage and other bank accounts, life insurance policies and annuities. With a beneficiary designation, you name the person or charity who will receive the proceeds or remaining funds after your lifetime. As your will or trust generally does not control these kinds of assets, having up-to-date beneficiary designations is key for ensuring the right person or nonprofit will receive this inheritance from you.

If you're considering a legacy gift to Action Against Hunger, a beneficiary designation may be the easiest, most tax-effective option to consider. You simply request a change of beneficiary form and provide our information:

**Legal Name: Action Against Hunger – USA**  
**Address: One Whitehall Street, 2nd Floor, New York, NY 10004**  
**Federal Tax ID#: 13-3327220**

### **TAKE ACTION TODAY:**

If you do not have one or more of these in place, or if you have not updated your documents recently, then now is the time to visit your attorney to complete or review them to make sure they reflect your current wishes. By organizing your plans now, you can have the peace of mind that your legacy will be preserved and your loved ones cared for into the future. For more information, please email [legacy@actionagainsthunger.org](mailto:legacy@actionagainsthunger.org) or visit <https://www.actionagainsthunger.org/take-action/make-a-gift/planned-giving/estate-gifts/>.

*Note: This information is not intended to be legal, tax, financial or other advice. Please consult an attorney or tax advisor for this kind of advice.*