

# 재산 계획 통합 문서



이 소책자는 귀하의 개인 및 재정 정보를 명확하고 정확하게 기록합니다. 재산 계획을 준비하는 데 사용할 수 있으며 또한 소중한 사람을 위해 정보를 정리하는 편리한 방법입니다. 가족 구성원 및 유언 집행자에게 손실 방지를 위한 사본을 제공 할 수 있습니다.

매년 기록을 갱신하십시오. 정보를 변경하지 않더라도 책자를 돌려 볼 때마다 날짜를 입력해야 합니다. 이것은 현재 항목의 정확성을 독자에게 확신시켜 줄 것입니다.

이 서류는 장로교 재단 또는 그 대리인에게 반환하면 안됩니다

이름 **Name** \_\_\_\_\_

수정 한 날짜 \_\_\_\_\_ 검토 한 날짜 \_\_\_\_\_

## 개인 정보 Personal Information

Date of Birth \_\_\_\_\_

Birth Certificate ☐ No ☐ Yes Located \_\_\_\_\_

Citizenship — date/place of naturalization if not U.S. citizen

by birth \_\_\_\_\_

Social Security # \_\_\_\_\_

Father's Full Name \_\_\_\_\_

Mother's Full Name \_\_\_\_\_

### 종교 **RELIGIOUS AFFILIATION**

Church \_\_\_\_\_

Address \_\_\_\_\_

### 결혼 상태 **MARITAL STATUS**

☐ Single ☐ Married ☐ Widowed ☐ Divorced ☐ Separated

Spouse's Name \_\_\_\_\_

Date & State married \_\_\_\_\_

Certificate located \_\_\_\_\_

Previous marriage? ☐ Yes ☐ No

Date \_\_\_\_\_ Name \_\_\_\_\_

Marriage ended by ☐ Death ☐ Divorce

### 자녀 **CHILDREN**

Name \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

병역 **MILITARY SERVICE** — Date(s) \_\_\_\_\_

Service Serial # \_\_\_\_\_

Discharge papers located \_\_\_\_\_

## 투자 Investments

나는 여러 가지 주식과 채권을 소유하고 있다

\_\_\_\_\_

\_\_\_\_\_

### 주식/채권/상호 기금 **STOCKS/BONDS/MUTUAL FUNDS**

Company \_\_\_\_\_

Shares \_\_\_\_\_ Date Purchased \_\_\_\_\_ Cost Basis \_\_\_\_\_

Company \_\_\_\_\_

Shares \_\_\_\_\_ Date Purchased \_\_\_\_\_ Cost Basis \_\_\_\_\_

Company \_\_\_\_\_

Shares \_\_\_\_\_ Date Purchased \_\_\_\_\_ Cost Basis \_\_\_\_\_

Records of purchase and sale are located at \_\_\_\_\_

\_\_\_\_\_

### 미국 저축금 **U.S. SAVINGS BONDS**

I own under the following ownership registrations:

☐ My name alone ☐ Joint with \_\_\_\_\_

Type \_\_\_\_\_ Face Value \_\_\_\_\_

Issue Date \_\_\_\_\_ Maturity Date \_\_\_\_\_

Serial Number \_\_\_\_\_

Type \_\_\_\_\_ Face Value \_\_\_\_\_

Issue Date \_\_\_\_\_ Maturity Date \_\_\_\_\_

Serial Number \_\_\_\_\_

Certificates of Deposit \_\_\_\_\_

Amount \_\_\_\_\_ Date of Redemption \_\_\_\_\_

Certificates of Deposit \_\_\_\_\_

Amount \_\_\_\_\_ Date of Redemption \_\_\_\_\_

### 파트너십 **PARTNERSHIPS** \_\_\_\_\_

\_\_\_\_\_

## 유서 & 장기 기증

나는 의료 및 치료에 대한 나의 소망을 진술하는 살아있는  
유서를 가지고 있습니다. 해당 문서는 \_\_\_\_\_ 날짜로 \_\_\_\_\_  
\_\_\_\_\_에 보관되어 있습니다.

Individuals having copies:

Name \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

장기 기증에 동의했습니다 (기관):

Papers are located \_\_\_\_\_

## 변호사 Power of Attorney

나는 다음 사람에게 나 자신을 위해 스스로 행동 할 수 없을  
시 영향을 줄 수 있는 내구성 있는 위임장을 주었습니다:

Name \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

## 마지막 유서와 유언 Last Will & Testament

Will written \_\_\_\_\_ Located \_\_\_\_\_

Executor of Will \_\_\_\_\_

Address \_\_\_\_\_

Attorney \_\_\_\_\_

Address \_\_\_\_\_

유언 간 신탁 \_\_\_\_\_

Trustee \_\_\_\_\_

Assets in Trust \_\_\_\_\_

Beneficiaries \_\_\_\_\_

유서에 나는 다음과 같은 자선 유산을 남겼습니다:

Charity \_\_\_\_\_

Bequest Amount \_\_\_\_\_

Charity \_\_\_\_\_

Bequest Amount \_\_\_\_\_

## 장례 & 매장 준비

나는 장례식에 관한 지시를 다음에 남겼습니다:

☐ Will ☐ Letter ☐ Other

I own a ☐ Cemetery plot ☐ Cemetery vault ☐ None

Name \_\_\_\_\_

Location \_\_\_\_\_ Section # \_\_\_\_\_ Plot # \_\_\_\_\_

Location of Deed \_\_\_\_\_

Other funeral arrangements \_\_\_\_\_

## 은행 계좌 & 금고 예금 상자

**BANK NAME** \_\_\_\_\_

☐ Checking ☐ Saving Account # \_\_\_\_\_

☐ Joint ☐ Individual

**BANK NAME** \_\_\_\_\_

☐ Checking ☐ Saving Account # \_\_\_\_\_

☐ Joint ☐ Individual

**BANK NAME** \_\_\_\_\_

☐ Checking ☐ Saving Account # \_\_\_\_\_

☐ Joint ☐ Individual

금고 예금 상자 **SAFE DEPOSIT BOX**

Location \_\_\_\_\_

Box # \_\_\_\_\_ Key Location \_\_\_\_\_

## 은퇴 계좌 Retirement Accounts

**COMPANY NAME** \_\_\_\_\_

Address \_\_\_\_\_

Account # \_\_\_\_\_

Beneficiary \_\_\_\_\_

Company Pension \_\_\_\_\_

**SOCIAL SECURITY** \_\_\_\_\_

**INDIVIDUAL RETIREMENT ACCT** \_\_\_\_\_

**ANNUITIES** \_\_\_\_\_

Beneficiary(ies) \_\_\_\_\_

**OTHER RETIREMENT BENEFITS** \_\_\_\_\_

Beneficiary(ies) \_\_\_\_\_

## 신탁 기금 Trust Funds

자선 신탁 **CHARITABLE REMAINDER TRUST**

Testamentary Trust \_\_\_\_\_

Trustee \_\_\_\_\_

Assets in Trust \_\_\_\_\_

Charitable Beneficiaries \_\_\_\_\_

Income Recipients \_\_\_\_\_

Papers are located at \_\_\_\_\_

**EXISTING TRUST** \_\_\_\_\_

I have created a trust for the benefit of \_\_\_\_\_

\_\_\_\_\_

I am a beneficiary under a Trust established by \_\_\_\_\_

\_\_\_\_\_

Date Established \_\_\_\_\_

Trust Agreement located \_\_\_\_\_

Attorney who drafted the Trust Agreement

\_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

## 개인 고용 Personal Employment

고용주 **EMPLOYER** \_\_\_\_\_

Address \_\_\_\_\_

I participate in the following benefit plans \_\_\_\_\_

\_\_\_\_\_

Other business interests \_\_\_\_\_

## 보험 Insurance

본인은 개인적으로 사고, 장애, 질병, 입원 및 기타 보험 형태 (본인의 고용주를 통해 제공되는 그러한 보험 또는 혜택에 추가)를 지니고 있습니다 ☐ Yes ☐ No

Company \_\_\_\_\_

Coverage \_\_\_\_\_

Insurance Agent \_\_\_\_\_

Phone \_\_\_\_\_ Policy # \_\_\_\_\_

Location of Policy \_\_\_\_\_

## 생명 보험 Life Insurance

본인 생명에 대한 보험 정책 소유

Insurance Company \_\_\_\_\_

Address \_\_\_\_\_

Insurance Agent \_\_\_\_\_

Phone \_\_\_\_\_

Policy # \_\_\_\_\_ Death Benefit \_\_\_\_\_

Location \_\_\_\_\_

Beneficiary(ies) \_\_\_\_\_

\_\_\_\_\_

타인의 생명에 대한 보험 정책 소유

Insurance Company \_\_\_\_\_

Address \_\_\_\_\_

Insurance Agent \_\_\_\_\_

Phone \_\_\_\_\_

Policy # \_\_\_\_\_ Death Benefit \_\_\_\_\_

Location \_\_\_\_\_

Beneficiary(ies) \_\_\_\_\_

\_\_\_\_\_

미납 된 보험금

Policy # \_\_\_\_\_ Amount Due \_\_\_\_\_

Policy # \_\_\_\_\_ Amount Due \_\_\_\_\_

본인 생명에 대한 다른 사람들 (자선 단체 포함)이 소유한 보험

\_\_\_\_\_

\_\_\_\_\_

## 유형적인 개인 재산

자동차 Automobile(s) \_\_\_\_\_

\_\_\_\_\_

보석, 미술, 골동품, 수집품 \_\_\_\_\_

\_\_\_\_\_

개인 재산의 전체 재고 목록은 다음에 있습니다:

\_\_\_\_\_

## 개인 고문 **Personal Advisors**

### 의사 **PHYSICIAN**

Address \_\_\_\_\_

Specialty \_\_\_\_\_ Phone \_\_\_\_\_

### **PHYSICIAN**

Address \_\_\_\_\_

Specialty \_\_\_\_\_ Phone \_\_\_\_\_

### 목회자 **CLERGY PERSON**

Address \_\_\_\_\_

Phone \_\_\_\_\_

### 변호사 **ATTORNEY**

Address \_\_\_\_\_

Phone \_\_\_\_\_

### 회계사 **ACCOUNTANT**

Address \_\_\_\_\_

Phone \_\_\_\_\_

### 보험사 **INSURANCE AGENT**

Address \_\_\_\_\_

Phone \_\_\_\_\_

### 신탁자 **TRUST OFFICER**

Address \_\_\_\_\_

Phone \_\_\_\_\_

### 투자 관리자 **INVESTMENT BROKER**

Address \_\_\_\_\_

Phone \_\_\_\_\_

### 기타 **OTHER**

Address \_\_\_\_\_

Phone \_\_\_\_\_

## 자선 기부 **Charitable Giving**

### 지역 교회 **LOCAL CHURCHES**

Name \_\_\_\_\_

Address \_\_\_\_\_

Tax ID # \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Tax ID # \_\_\_\_\_

### 교단 **NATIONAL CHURCH**

Name \_\_\_\_\_

Address \_\_\_\_\_

Tax ID # \_\_\_\_\_

기타 기관들 **OTHER PC(USA) ENTITIES** *(Board of Pensions, Presbyterian Foundation, retirement homes, seminaries, etc.)*

Name \_\_\_\_\_

Address \_\_\_\_\_

Tax ID # \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Tax ID # \_\_\_\_\_

### 선교 기관 **MISSION ORGANIZATIONS**

Name \_\_\_\_\_

Address \_\_\_\_\_

Tax ID # \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Tax ID # \_\_\_\_\_

### 기타 **OTHER**

Name \_\_\_\_\_

Address \_\_\_\_\_

Tax ID # \_\_\_\_\_

## 개인 채권자 Personal Creditors

채권자 **CREDITOR** \_\_\_\_\_

Loan # \_\_\_\_\_

Amount of Loan \_\_\_\_\_

Date of Final Payment \_\_\_\_\_

채권자 **CREDITOR** \_\_\_\_\_

Loan # \_\_\_\_\_

Amount of Loan \_\_\_\_\_

Date of Final Payment \_\_\_\_\_

신용 카드 **CREDIT CARD DEBT**

**Company** \_\_\_\_\_

Account # \_\_\_\_\_

Phone \_\_\_\_\_

**Company** \_\_\_\_\_

Account # \_\_\_\_\_

Phone \_\_\_\_\_

## 개인 채무 Personal Debtors

채무자 **Name of Debtor** \_\_\_\_\_

Address \_\_\_\_\_

Amount owed \_\_\_\_\_

**Name of Debtor** \_\_\_\_\_

Address \_\_\_\_\_

Amount owed \_\_\_\_\_

## 세금 관리 Tax Returns

Tax Preparer \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Copies of my income tax returns are located at:

\_\_\_\_\_

## 소유 주택 Residence & Other Real Estate

Residence Address \_\_\_\_\_

I own residence ☐ Yes ☐ No

**Ownership title is held in**

☐ My name alone ☐ Joint with \_\_\_\_\_

**Mortgage on property** ☐ Yes ☐ No

Held by \_\_\_\_\_

**Documents concerning this property are located at:**

\_\_\_\_\_

**I own other real estate located at:**

\_\_\_\_\_

**Homeowners insurance broker** \_\_\_\_\_

Firm \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

## 디지털 감사 Digital Audit

**Account Type** \_\_\_\_\_

Company \_\_\_\_\_

Username \_\_\_\_\_

Password \_\_\_\_\_

**Account Type** \_\_\_\_\_

Company \_\_\_\_\_

Username \_\_\_\_\_

Password \_\_\_\_\_

**Account Type** \_\_\_\_\_

Company \_\_\_\_\_

Username \_\_\_\_\_

Password \_\_\_\_\_

**Account Type** \_\_\_\_\_

Company \_\_\_\_\_

Username \_\_\_\_\_

Password \_\_\_\_\_

[illegible]

이 책자의 추가 사본을 원하시면 아래로 연락하십시오:



200 E 12th Street, Jeffersonville, IN 47130  
800-858-6127    [presbyterianfoundation.org](http://presbyterianfoundation.org)