

# National Estate Planning Awareness Week

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October 21 through October 27 is National Estate Planning Awareness Week. The National Association of Estate Planners and Councils (NAEPC) started this effort with the help of Congressman Mike Thompson of California in 2008. Congress passed a resolution designating the third week of every October as National Estate Planning Awareness Week.



NAEPC is the association of choice for estate planning professionals, providing its 2,000 accredited estate planner designated professionals, 270 affiliated local estate planning councils, and their estimated 30,000 members with ongoing education and a forum for networking within the estate planning community.

The Importance of Estate Planning Estate planning can be a tough topic to talk about. [One survey found that almost 60% of Americans do not have a living will or trust.](#) It makes sense – it's never comfortable to confront these types of scenarios – but that shouldn't stop us from dealing with the issue head-on. Here's a more positive way to look at what can be a touchy subject: estate planning is how you prepare to take care.

Prepare to take care of your assets to ensure you take care of your loved ones in the event the unexpected happens.

"For some people, estate planning can be wrought with emotional minefields. If a person has worked hard to accumulate assets and wants certain people or organizations to benefit when they're gone, it's essential to put these instructions in writing," says Beth Kougasian, Director of Major and Planned Gifts, Calvary Hospital. "Failing to comply with the legal requirement for establishing a Will can prevent your estate from benefiting people or organizations you care about the most."

**"The key to removing some of the anxiety surrounding estate planning is education and awareness. By studying the importance of estate planning and becoming familiar with various wealth preservation strategies, you can plan more effectively. This will ensure that you protect and provide for your loved ones."**

The good news is, you're not alone in your planning efforts. There are plenty of resources you can tap into to help you through this important process, and Calvary Hospital wants to play a vital role in helping to educate the public about estate planning. This post will look at a few opportunities to raise awareness regarding estate planning, as well as a potential approach you can take.



Elizabeth Edds Kougasian,  
Esq., Director of Major  
and Planned Gifts

## Calvary's Commitment to Excellence in Estate Planning

Since 2003, Calvary has hosted an annual trust and estates conference. Each year, this event provides continuing legal education to more than 250 of the tri-state area's top trust and estates attorneys. Calvary has developed a reputation for presenting timely topics with distinguished panelists that help keep attorneys current on changes in the law, and in their ethical and professional responsibilities to clients. To learn more about the most recent conference [click here](#).

Many donors have taken advantage of Calvary's experience in estate planning. Each week, our Calvary Fund department handles inquiries about the use of assorted assets and planned giving techniques for estate planning in addition to estate administration issues.



The Hospital's planned giving newsletter, [Foresight](#), is also an excellent resource. Each issue spotlights individuals who have included Calvary in their estate plan. To honor these individuals, Calvary established The Society of 1899 to commemorate them. 1899 is the same year that the Hospital was founded. To see the latest issue of [Foresight](#).

## A New Trend in Estate Planning

This week of awareness emphasizes the importance of thinking strategically about planning your estate. One of the more effective approaches is the process of collaborative planning. As opposed to viewing estate planning merely as an exercise in disposing of your assets, collaborative planning makes it a group effort and broadens the focus.

[Collaborative planning](#) is a comprehensive approach to estate planning where the individual essentially builds a personalized team to help manage the process. This team may include specialized advisors dedicated to a specific area of expertise such as accounting, financial planning, insurance, social work (Medicare/Medicaid, senior housing), banking, investments, philanthropy, and law.

You ready yourself with an experienced team of professionals who can advise you on a variety of topics relevant to your personal circumstances. It's a more integrated approach to estate planning.

Establishing a frank, open dialogue in which you're crystal clear about your expectations for your estate will solve a lot of headaches later on. A little preparation can go a long way to providing you with the peace of mind that you have secured your family's financial future.

Calvary Hospital is an industry leader in developing holistic solutions for end-of-life care. [Learn more about CalvaryCare<sup>SM</sup> and supporting our mission.](#)