

Bill High



## Guide to Purposeful Language

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Communicate your heart in estate documents



Most legal documents lay out for beneficiaries, executors, and trustees how the Grantor desires his or her financial assets to be distributed.

Most documents do not include any language regarding the parents' deep and heartfelt values, hopes, dreams, and intentions for the wealth they are passing on.

Many clients would like to include some language regarding their love for their heirs, their own personal values, their faith, and the purposes they hope to see accomplished with the wealth. We call that "Purposeful Language."

When we assist a client in writing the purposeful language they want to include in their documents, we encourage them to put it in their own words. Our clients' own words are the most eloquent and effective expressions of their deepest purposes, hopes, and dreams.

Some characteristics of this purposeful language include:

1. It is written in first person.

*If you are creating three trusts, you make each one personal to the specific beneficiary.*

2. It captures the voice of the trust creator.

3. It includes some positive thoughts that the parent expresses about the beneficiary.

*A child's awareness of the positive emotion their parent had at the time of making a gift has profound influence on the child's ability to feel deep gratitude for the gift.*

4. It includes a statement regarding their love for their child.

5. It includes a statement of the parents' relationship to God and His role in their lives.

6. It includes their hopes and dreams for their children.

7. It is no longer than one page.





# Ideas and Examples

*Below are suggestions for including positive thoughts about your children, followed by several examples of document introductions.*

## Suggestions for creating and writing positive thoughts about your children:

1. Reflections about the day you were born
  2. How we chose your name and what it meant to us
  3. Memories of trips or vacations when we created priceless memories
  4. Things I have always admired about you
  5. Special talents or gifts I feel you have been given and the great potential I have seen in you
  6. Really difficult challenges I have seen you overcome and how I felt about your effort
  7. Things you said or did for me which really made me feel special or loved
  8. How I felt when you passed important milestones such as a graduation, your first big job, etc.
  9. Favorite quotes or life lessons I think may be important to you or your children in the future
  10. A favorite life Bible verse that has led and encouraged you through life
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## Introduction to Our Wills (Sample)

To James, Elizabeth, Peter, and Julia: We have been incredibly blessed in our lives, as you know. Faith has played an integral role in our lives as well. All major decisions and many other decisions were prayed over and we have tried to follow the path that we believed God set for us.

We have also tried to emulate our parents, who loved us greatly and provided generously for our comfort and security. We have tried to pass along this benefit to you and ask that you strive to do the same with these resources in your life. Now it is our turn to pass along some of our financial blessings, but we would ask that you consider the following suggestions.

- Each of you is extremely talented and capable of achieving great thing. Strive to be your best self and in all that you do remember JOY, which is Jesus, Others, and then Yourself.
- This inheritance is from God, who gave us the ability to achieve this, and we would ask that you constantly thank Him for this blessing when you need it.
- Use your inheritance wisely and remember that money is both a blessing and a curse. Do your best not to invade principal and, if possible, grow your inheritance for the betterment of others.

Finally, we hope that each of you will turn your lives over to Jesus, for our time here is brief and yet our time in heaven is eternal. So we look forward to being reunited again and we will enjoy seeing how you have all done.

With much love,  
Mom and Dad

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## Introduction of Deed of Trust (Sample)

For the benefit of our daughter, Mary Doe

I John Doe, of Gwinnette County, Georgia, make this deed of trust and I hereby appoint my wife, Jan Doe, as trustee.

### Joint Introduction

To Mary, our beloved daughter. We have been incredibly blessed in our lives, as you know. Faith has played an integral role in our lives as well, and we have always tried to love and serve God.

As we pass along some of our financial blessings to you, we would ask that you remember the following:

- This inheritance is from God, who gave us the ability to achieve this, and we would ask that you constantly thank Him for this blessing when you need it.
- Use your inheritance wisely and remember that money is both a blessing and a curse. Do your best not to invade principal and if possible grow your inheritance for the betterment of others.

Finally, we hope that you will live your life for Jesus, for our time here is brief and yet our time in heaven is eternal. So we look forward to being reunited again in the presence of God forever.

With much love,  
Mom and Dad

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## Document Introduction (Sample)

Beloved family,

How we love you, your children, and their children.

As you learn about how your mother and I will distribute our inheritance to you, we want to remind you that the most important gift we could ever give you is the gift of wisdom.

We like these words in 3 John 2-4 "Beloved, I pray that in all respects you may prosper and be in good health, just as your soul prospers. For I was very glad when brethren came and bore witness to your trust, that is, how you are walking in trust. I have no greater joy than this, to hear of my children walking in the truth."

We think these words beautifully express our desire for each of you.

We desire that you would prosper in all respects and we hope that our gifts assist you in that endeavor. And as the Apostle John says, the way to ensure that you prosper in all respects is to make sure that your soul prospers. Our hope is that you will give regular attention to your relationship to God and His word.

It is our fondest wish for you that you walk in the truth of God's word and the Lord Jesus Christ.

With much love,  
Mom and Dad

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