Creating a will

No matter your age or stage of life, having a will that reflects your values and wishes is an important step in planning for the future—for yourself, your loved ones, and the causes you care about, such as Navy-Marine Corps Relief Society.

Steps to create a will

A will is a legal document that outlines how your assets will be distributed after your passing. Because state and federal laws govern wills, it is important to consult with an estate planning attorney in your state.

Creating a will typically involves a few straightforward steps:

✓	Request information on how to create a will	Congratulations, you've already completed this step.
	Take inventory of your assets	List everything you own—your home, vehicles, bank and investment accounts, retirement plans, life insurance, and personal items like jewelry, art, or collectibles. Decide who you want to receive each item, whether individuals or charitable organizations.
	Gather important documents	Locate titles, deeds, and ownership records for your assets. Keep these organized and stored in a secure place.
	Name a guardian (if applicable)	If you have children under 18, designate a trusted person to care for them if you and your spouse are no longer able.
	Select an executor	Choose someone responsible to carry out the terms of your will as intended.
	Draft your will	An attorney can draft a legally sound will that reflects your wishes. NMCRS partners with FreeWill to offer a complimentary will-writing resource as well. Once your will is drafted and notarized, store the original document in a safe location and ensure your executor, or a trusted family member, knows where to find it.

How often should I update my will?

Once you've created an estate plan—including your will, power of attorney, living will, and any trusts—it is important to revisit these documents regularly. A good rule of thumb is to review your plan every few years, especially after major life events such as:

- Changes to your family, including birth, adoption, marriage, divorce, or the passing of a loved one.
- Changes in state or federal estate laws.
- Updates to your chosen executor, guardian, or trustee.
- Significant changes in your financial situation, such as acquiring or selling major assets.

Is estate planning expensive?

The cost of creating a will can vary depending on the complexity of your estate and the legal guidance required. While there is an upfront investment, proper planning can help avoid more costly complications during probate. Working with an experienced estate attorney ensures your wishes are clearly documented and easier to fulfill.

What happens if I don't have a will?

If you pass away without a will, your assets will be distributed according to state laws—often through a court-appointed administrator. This process may not reflect your personal wishes or priorities. Additionally, decisions about guardianship for minor children may be made by the court, rather than by you.

Leaving a legacy

Navy-Marine Corps Relief Society is powered by compassion. Including a gift in your will is a meaningful way to support Sailors, Marines, and their families for generations to come.

How can I leave a legacy to Navy-Marine Corps Relief Society in my will?

There are several ways to structure your gift:

- A specific dollar amount
- A percentage of your estate
- A residual gift, which is all or a portion of what remains after providing for loved ones

"I give and bequeath to Navy-Marine Corps Relief Society, a nonprofit charitable organization (EIN 53-0204618), incorporated in Washington, DC, and headquartered at 875 N. Randolph Street, Suite 225, Arlington, Virginia 22203, the sum of $________ or _____% of my estate. This gift is to be used in a manner deemed appropriate by the organization."

Unrestricted gifts allow the greatest flexibility, enabling the Relief Society to direct funds where the need is most urgent. If you prefer to designate your gift for a specific purpose, please discuss your plans with us in advance.

NMCRS partners with FreeWill to offer a complimentary will-writing resource. Scan the QR code to create your will, identify beneficiaries, or to let us know of your planned gift intention.

What is the Clarence Dillon Society?

The Clarence Dillon Society recognizes individuals who have chosen to leave a lasting legacy by including Navy-Marine Corps Relief Society in their wills, trusts, or other planned gifts.

Members of this special group are acknowledged with a certificate signed by the President and CEO, along with a token of appreciation. If you've already included NMCRS in your estate plans, notifying us ensures your generosity is recognized and celebrated.

> **The Navy was her family, and she wanted to do something so Sailors, Marines and their families would not have to struggle like she did.**
>
> *– Executor, Estate of CDR Helen R. Maznio, USN (Ret.)*

> **My father was very grateful for the help he received from NMCRS. He included the Relief Society in his will to honor his duty and service to our country. I hope his gift will help others to be successful, just as he was, and to better the lives of military families.**
>
> *– Daughter of LCDR Glen Ellis, USN (Ret.)*

We understand that charitable giving is a personal decision, and we are grateful for your support.
Please contact the NMCRS Development team at **giving@nmcrs.org** or **800-654-8364** to discuss the giving option that best meets your needs.

NMCRS (EIN 53-0204618) is a 501(c)(3) nonprofit organization located at 875 N Randolph St., Suite 225, Arlington, VA 22203.

NMCRS does not provide tax or legal advice; this information is intended as general guidance only. NMCRS does not receive any government funding; we operate entirely on private donations.