



Make-A-Wish®
ALASKA AND WASHINGTON

Legacy of Wishes

FALL 2022 wish.org/akwa

Local man leaves legacy of selflessness

When 63-year-old Alan Naiman passed away in 2019 surrounded by friends and family, those closest to him had no idea the surprise that was waiting in his estate plan. The notoriously frugal Alan had quietly amassed an \$11 million fortune that he left behind to children's charities, including Make-A-Wish Alaska and Washington.

"The way Alan lived, nobody would have ever suspected that he was going to leave this gigantic legacy," said Shashi Karan, a longtime friend. "He lived such a simple life and his frugality was legendary."

In his lifetime, Alan never hesitated to help a friend in need. He dedicated his life to helping the most vulnerable populations among us through a variety of service programs. A

foster parent and youth mentor, Alan left behind a career in accounting to become a social worker for the Department of Social and Health Services. Perhaps that's why Alan chose to dedicate his estate to continue his life's work.

"I am overwhelmed by the amount of good he did and continues to do,"

— friend Mary Monahan

"I am overwhelmed by the amount of good he did and continues to do," said longtime friend Mary Monahan. "He just kept it so secret. It wasn't anything he ever talked about."

When Alan was diagnosed with cancer in 2017, he began researching local children's charities. Alan had no children of his own but knew that his legacy

would provide essential support to children facing a variety of challenges—including those with critical illnesses. Through his planned gift, Alan continues to help his beloved children's charities even after his death.

Alan's story highlights the remarkable ability that everyone has to make a difference—anyone can be a wish kid's hero. You can help create wishes for children battling critical illnesses and provide hope and healing to their families for generations to come.

For more information on how to get started on naming Make-A-Wish Alaska and Washington as a beneficiary of your will, life insurance, retirement or estate plan, contact **Lauren Martin** at Immartin@akwa.wish.org or 206.623.5314.

End of Life Planning Checklist:

12 Documents That You Should Consider

Preparing for your legacy is one of the best gifts that you can provide to your loved ones to help ease the burden. Our friends at *Freewill.com* have provided this handy checklist to help jumpstart your planning.



Your Estate Plan

1 Last will and testament

- Name a guardian for minor children
- Name a guardian for your pets
- List all personal property and decide which people/charities you want to receive each asset
- Name an executor to carry out the terms of your will

2 Revocable living trust

- List all personal property and decide which people/charities you want to receive each asset
- Transfer your personal property into the trust
- Name a successor trustee to manage your trust after you pass away

3 Beneficiary designations

- Name a beneficiary for all non-probate assets, including:
- 401(k) and IRA accounts
 - Life insurance policies
 - Pensions

4 Durable financial power of attorney

- Choose a financial agent to make important financial decisions for you
- Decide which financial decisions you want your agent to be able to make
- State in your document that you want it to be “durable”

5 Pet trust

- Establish and fund the pet trust
- Name a successor trustee to manage your trust after you pass away
- Name a guardian for your pets
- Include instructions about how the funds should be used to pay for your pet’s care (medical instructions, preferred nutrition/toys, etc)



Your Advance Care Plan

6 Durable medical power of attorney

- Choose a healthcare agent to make important medical decisions for you
- Decide which medical decisions you want your agent to be able to make
- State in your document that you want it to be “durable”

7 Living will

- Outline your medical care preferences for your doctors and healthcare agent to follow
- Consider sharing this document with your healthcare agent to make sure they understand your wishes

8 Life insurance

- Consider your age, expenses, and number of dependents to choose a plan with appropriate coverage
- Revisit your plan every few years to determine if your needs have changed

9 DNR and POLST forms

- Often used only by people with failing health or an existing diagnosis
- Ask your doctor to draw up a DNR
 - Ask your doctor to outline your wishes for your end-of-life care in POLST forms



Other Documents

10 End-of-life housing arrangements

- Think about where you want to live in your final days. Consider cost, convenience, and other factors
- Share your preferences with your loved ones so they understand your wishes

11 Instructions for your digital assets

- Consider using a digital vault or password manager to track important logins and passwords (including keys to cryptocurrency wallets)
- Consider naming a digital executor in your will to solely manage your digital assets

12 Funeral instructions and preferences

- Burial, cremation, etc.
- Type of service you prefer
- Preferred charities for donations
- Write or outline your obituary
- Instructions for what should be written on your tombstone

How Your Property Gets Transferred Without A Will

By: *Freewill*

Your house is more than just a shelter. It’s where you spend time with your family, care for your loved ones and experience some of life’s most meaningful moments. So, having a valid will is the best way to ensure it is managed according to your wishes after you’ve passed.

Without a will, you may forfeit control over important parts of your estate — including who receives your home.

Transferring property without a will

Dying without a valid will (known as dying intestate) means you didn’t leave any legal instructions for what should happen to your property. Your loved ones will then have to go through the stressful and potentially expensive process of transferring your property.

If you pass away with outstanding debt — like a car payment or credit card charges — those debts will need to be paid from your estate before your beneficiaries can inherit what’s left.

Several other factors can affect what happens to your property if you die intestate, including whether your home is jointly or solely owned.

Transferring property if you have joint ownership

Owning your home with someone else — like a spouse or partner — is known

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as “joint ownership.” In this case, the other person automatically becomes the property’s sole owner when you pass. This only applies if you’re both listed on the deed.

Transferring property if you have sole ownership

If your name is the only one listed on your house deed (called “sole ownership”), the process of distributing your assets becomes more complicated.

Without a will, your property will become subject to intestate succession laws

to determine who receives your assets. While this order can vary depending on your state, intestate succession laws generally prioritize individuals in the following order:

1. Your spouse
2. Your children
3. Your parents
4. Your siblings

If none of these relations can be located, the court will look for your closest living relative by blood or marriage. Ownership will be transferred to this person and the process of administering your estate will continue.

If the court can’t find any next of kin, the state will take control of your property as a last resort.

Take control of your estate by making a will

Planning for the future is easy with FreeWill’s do-it-yourself will-making tool. In just 20 minutes, you can give yourself peace of mind — and a will of your own.

Scan the QR code or visit [Freewill.com](https://freewill.com) to learn more.



Lauren Martin
Vice President of Advancement

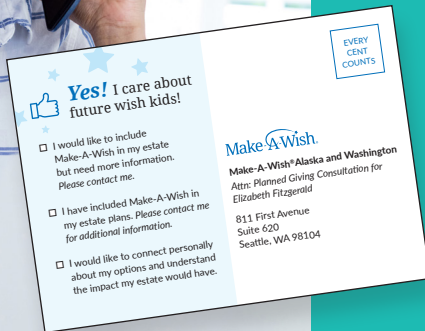


Are we in your plans? We would like to know!

Most retirement plans assume no obligation to notify your beneficiaries of your election, whether you’ve named a nonprofit or a person as your beneficiary.

If you’ve named Make-A-Wish Alaska and Washington as a beneficiary in your plan, contact Lauren Martin at 206.623.5314 or at Immartin@akwa.wish.org, or send back the enclosed postcard.

It would be our honor to thank you for your generosity and welcome you into the *Legacy of Wishes Society*.



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