



## YOUR WORKBOOK

LIFE & LEGACY PLANNING

KEEP YOUR FAMILY OUT OF  
COURT AND CONFLICT



# 3 WAYS TO GET MASSIVE VALUE FROM THIS WORKBOOK

1

Print this workbook and refer to it during our educational webinar to stay fully engaged and take notes on the actions you want to implement quickly.



2

Think of ONE question you want answered while we are on the webinar together. If I don't answer your question during the webinar, you can ask it during the Q&A.



3

Think about the people in your life who you trust most. During the webinar, imagine them in the roles presented and imagine what they would want to know.



# THE 3 BIGGEST FEARS

## ABOUT ESTATE PLANNING

1

Planning for "it" will

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2

It will

---

---

too

3

I'm not

or

enough

enough

NOTES

# THE REALITY IS...

Estate planning is not about

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It is about the people you

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They will know whether you lived up to your promise

“

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”

WHO NEEDS YOU TO PLAN BY NAME?

# LIFE INSURANCE FOR A MINOR

SAD DAY NO. 01

1

court is required.

2

override your will.

3

A \_\_\_\_\_  
is a will substitute.

IDEAS, INSIGHTS AND ACTION ITEMS

# EMERGENCY SITUATION

SAD DAY NO. 02

1

guardianship  
is just as important as who raises your kids.

2

Only \_\_\_\_\_  
are the default temporary guardians.

3

Your plan \_\_\_\_\_  
unless you share it with others.

IDEAS, INSIGHTS AND ACTION ITEMS

# ADULT IS INCAPACITATED

SAD DAY NO. 03

1

Your doctors cannot talk to anyone about your condition without \_\_\_\_\_

2

Your medical decisions are made by \_\_\_\_\_ by default.

3

It does not make a difference if you are \_\_\_\_\_

IDEAS, INSIGHTS AND ACTION ITEMS

# A PARENT PASSES AWAY

SAD DAY NO. 04

1

When to \_\_\_\_\_  
is decided as a group.

2

A \_\_\_\_\_ has the  
final say-so as to who raises your children.

3

Out-of-\_\_\_\_\_ real estate  
means \_\_\_\_\_ probate.

IDEAS, INSIGHTS AND ACTION ITEMS

# YOUNG ADULTS (& THE IRS) INHERIT

SAD DAY NO. 05

1

The \_\_\_\_\_ comes before your children and heirs.

2

With \_\_\_\_\_ your children and heirs have no financial guidance.

3

You can build in a \_\_\_\_\_ to help your children and heirs adjust.

IDEAS, INSIGHTS AND ACTION ITEMS

# WHAT MATTERS MOST

## BONUS LESSON

1

Your \_\_\_\_\_

2

Your \_\_\_\_\_

3

Your \_\_\_\_\_

4

Your \_\_\_\_\_

IDEAS, INSIGHTS AND ACTION ITEMS

# HOW YOU TAKE ACTION TODAY

BEFORE IT'S TOO LATE



Schedule your Life & Legacy Planning Session to get  
on your estate plan.



This is a working meeting where you choose which estate plan is  
for you, we start designing  
your estate plan, you sign the engagement agreement, and you  
select a payment option.



Then we will schedule your Signing Ceremony before you leave,  
which is the big day of  
that your estate plan is in place.



## POP THE CHAMPAGNE!



IDEAS, INSIGHTS AND ACTION ITEMS

# CHEAT SHEET

## FILL IN THE BLANKS

### 3 BIGGEST FEARS

hasten its occurrence  
take too long  
old  
wealthy

### SAD DAY NO. 4

remove life support  
probate judge  
out-of-state  
double

### BIG PICTURE

you  
love most  
"I took care of it"

### SAD DAY NO. 5

IRS  
outright distributions  
financial mentor

### SAD DAY NO. 1

probate  
title (or joint ownership)  
beneficiary designations  
revocable living trust

### BONUS LESSON

insights  
values  
stories  
experiences

### SAD DAY NO. 2

short-term  
adult blood relatives  
will not work

### HOW TO TAKE ACTION

best  
right  
celebration

### SAD DAY NO. 3

hipaa release  
committee  
married