



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 _____

2

It will _____

too _____

3

I'm not _____ enough
or _____ enough

NOTES

THE REALITY
IS...

“

“

LIFE INSURANCE FOR A MINOR

SAD DAY NO. 01

1

_____ court is required.

2

_____ and

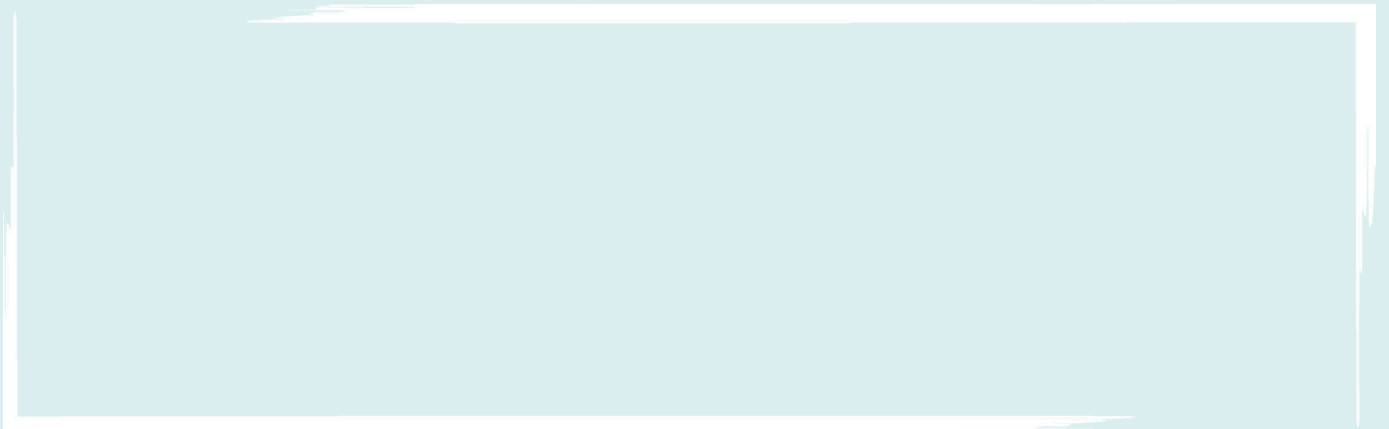
_____ override your will.

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.



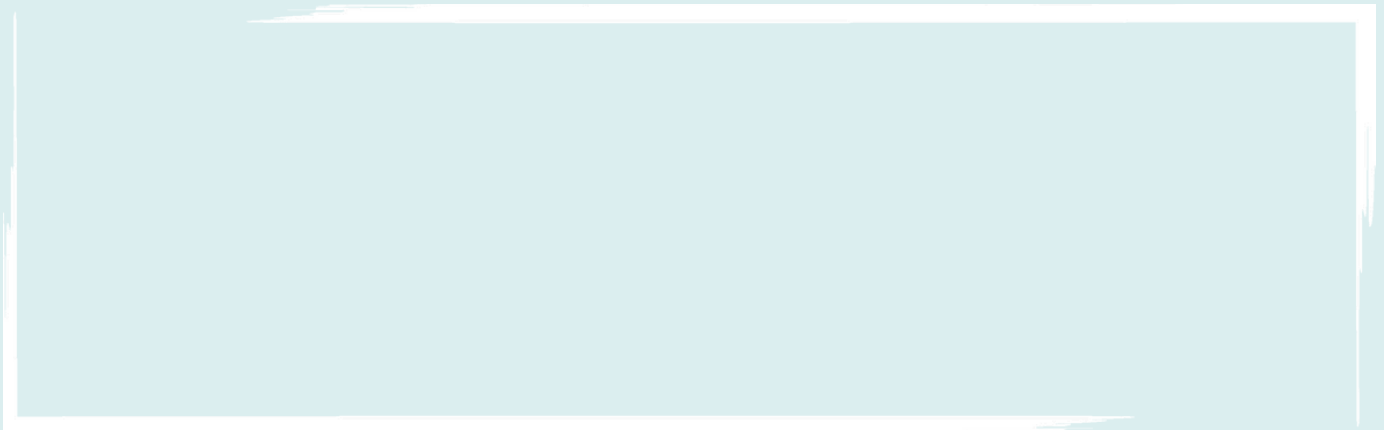
Then we will schedule your Signing Ceremony before you leave,
which is the big day of _____
that your estate plan is in place.



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

BIG PICTURE

you
love most
"I took care of it"

SAD DAY NO. 1

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

SAD DAY NO. 2

short-term
adult blood relatives
will not work

SAD DAY NO. 3

hipaa release
committee
married

SAD DAY NO. 4

remove life support
probate judge
out-of-state
double

SAD DAY NO. 5

IRS
outright distributions
financial mentor

BONUS LESSON

insights
values
stories
experiences

HOW TO TAKE ACTION

best
right
celebration