



YOUR WORKBOOK

LIFE & LEGACY PLANNING

KEEP YOUR FAMILY OUT OF
COURT AND CONFLICT



3 WAYS TO GET MASSIVE VALUE FROM THIS WORKBOOK

1

Open the fillable workbook on your device or print a copy before the webinar. Follow along, answer the questions, take notes, and capture the action steps you want to implement right away.



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...

Estate planning is not about

It is about the people you

They will know whether you lived up to your promise

“

”

WHO NEEDS YOU TO PLAN BY NAME?



LIFE INSURANCE FOR A MINOR

SAD DAY NO. 01

1

_____ court is equired.

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 large white rectangular box with a thin dark border, intended for writing 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

Scan the QR code to schedule
a 15-minute discovery call



or call **(850) 426-3622** and connect with **April or Danielle**
to reserve your **Life & Legacy Planning Session.**



POP THE
CHAMPAGNE!



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