



LEGACY WILL PLANNING GUIDE

Your Legacy Will

Your legacy includes much more than the sum of your assets and possessions; your legacy is the impact you make on those who outlive you. This is your chance to really think about how you want to live on in the lives of those you love. Planning your legacy gives you the opportunity to intentionally decide how you will leave your mark on your loved ones, your community, and the world. A Legacy Will goes beyond the traditional Last Will & Testament to include all of the important things beyond the dollars and cents that you want to instill and pass down to future generations. It can include things like family recipes, generational stories, family values, philosophies, family traditions, important causes and charities, favorite quotes, funny stories, wisdom, advice, and more.

Use this workbook to guide you in creating your Legacy Will. Find a quiet space and take some time to reflect on each question. These questions serve as a guide so that you can create something meaningful. There is no right or wrong way to approach these questions. Make it YOU.



What are the principles and values that guide your family?
(You can create a list, tell stories, provide quotes, etc...) What values do you hope to instill and pass on to your family?

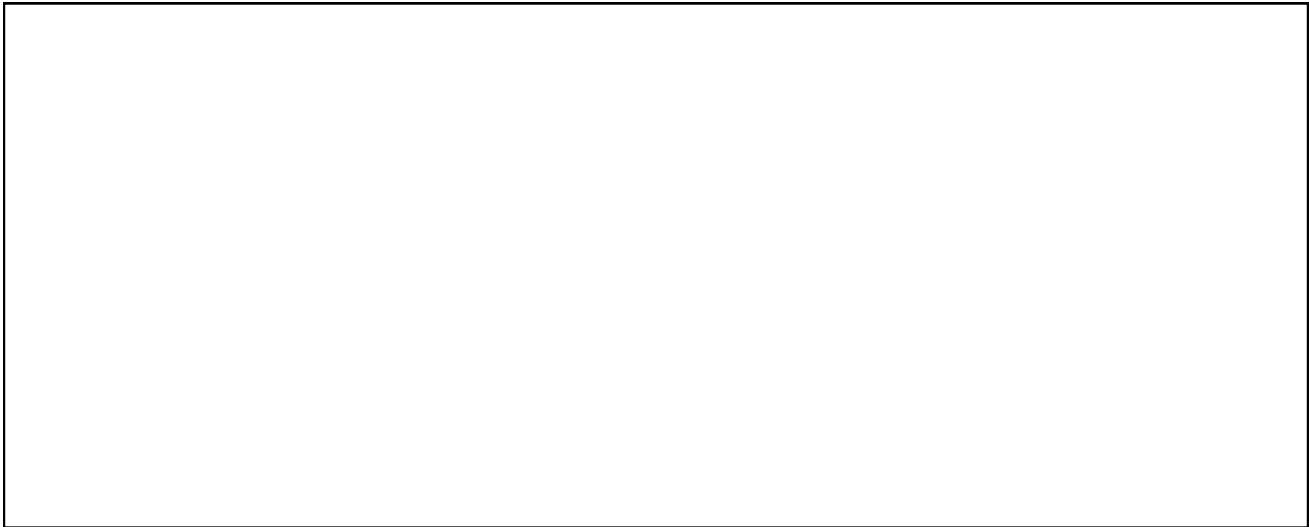
List 10 of your core values

List 3 of your favorite quotes

What is one story you wish to pass down?

What lessons have you learned in life that you hope will serve as guideposts to your children and future generations?

Share 2 lessons you have learned



What are 4 of your guideposts?



What are some of your family traditions?

Name 3 family traditions below. Share where the tradition started and any specific memories you have participating in these family traditions.

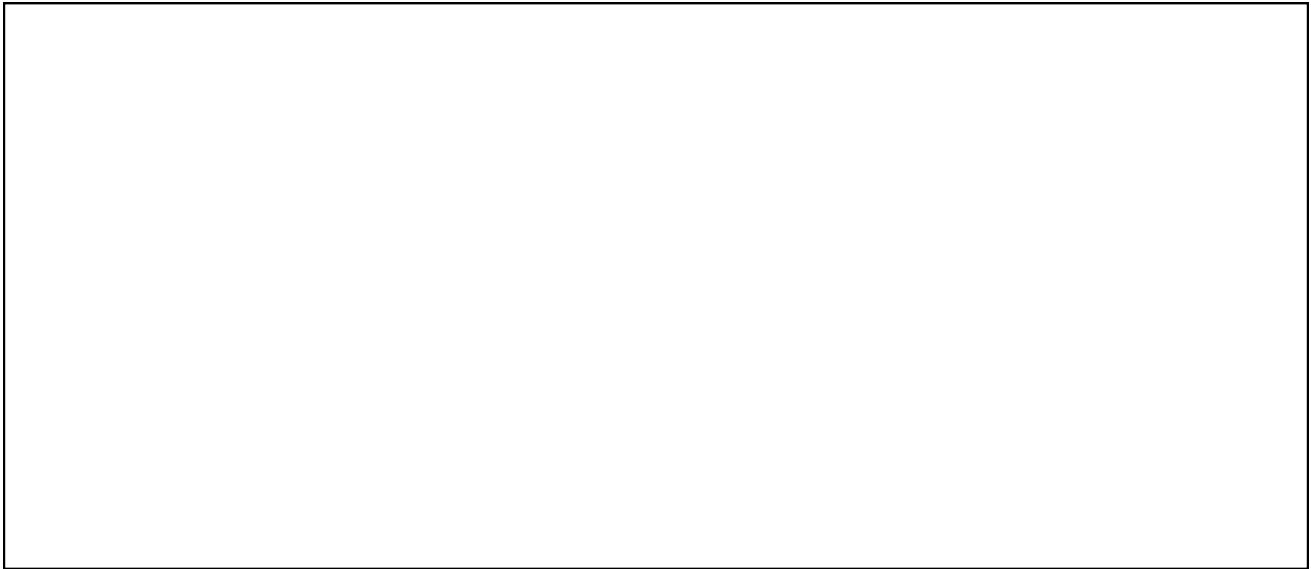
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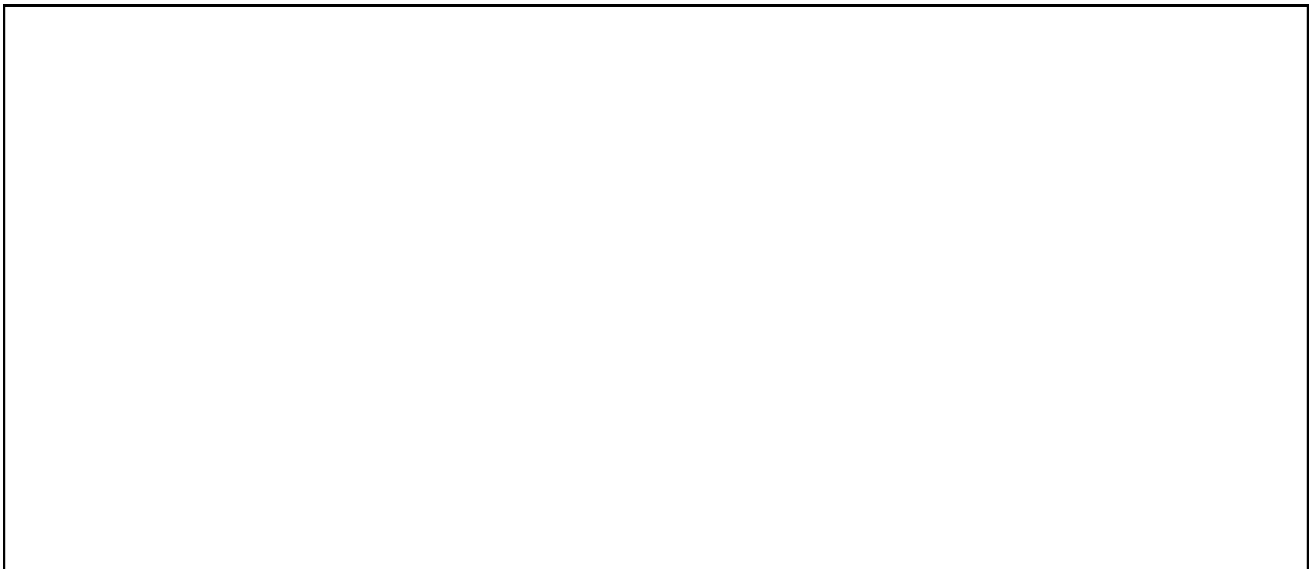
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What are the skills you plan and hope to teach your children and grandchildren, or pass on to the world? Did you learn these skills from someone that passed them down to you?

2 skills you hope to teach others



Who taught you these skills? Share a few memories about the person(s) who passed these skills on to you. If you were self taught, then share how you learned these skills.



What character traits are important to you?

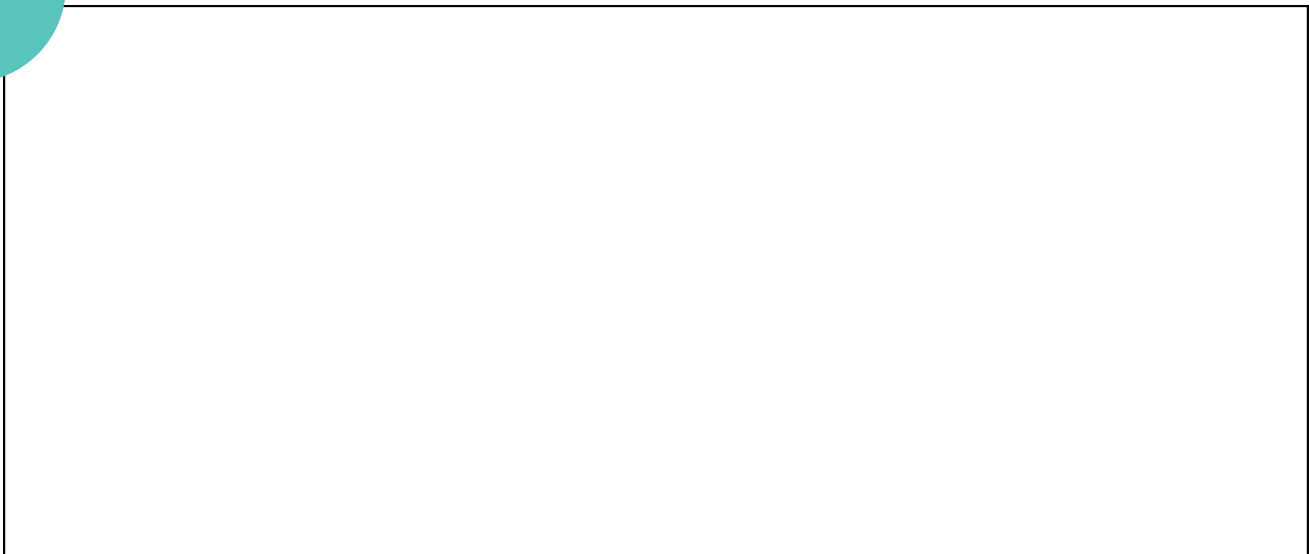
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List four character traits you try to emulate and one person in your life that represents each one of these character traits well.



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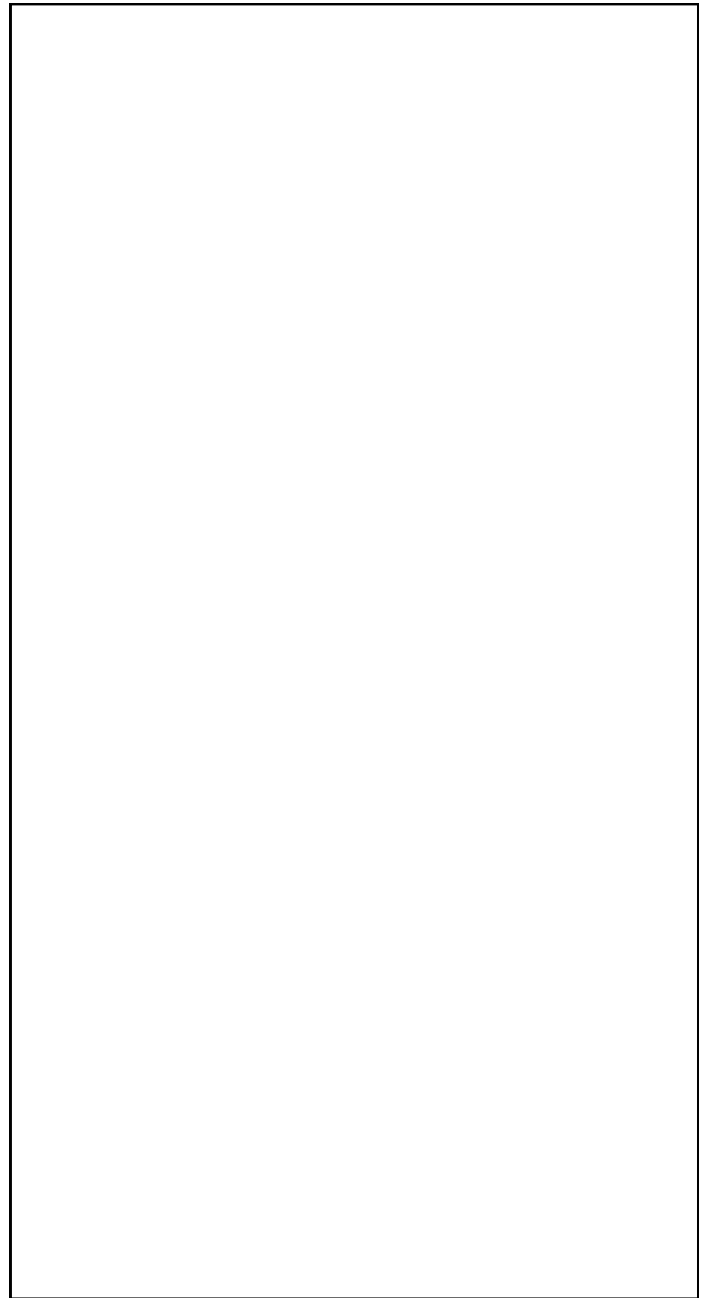
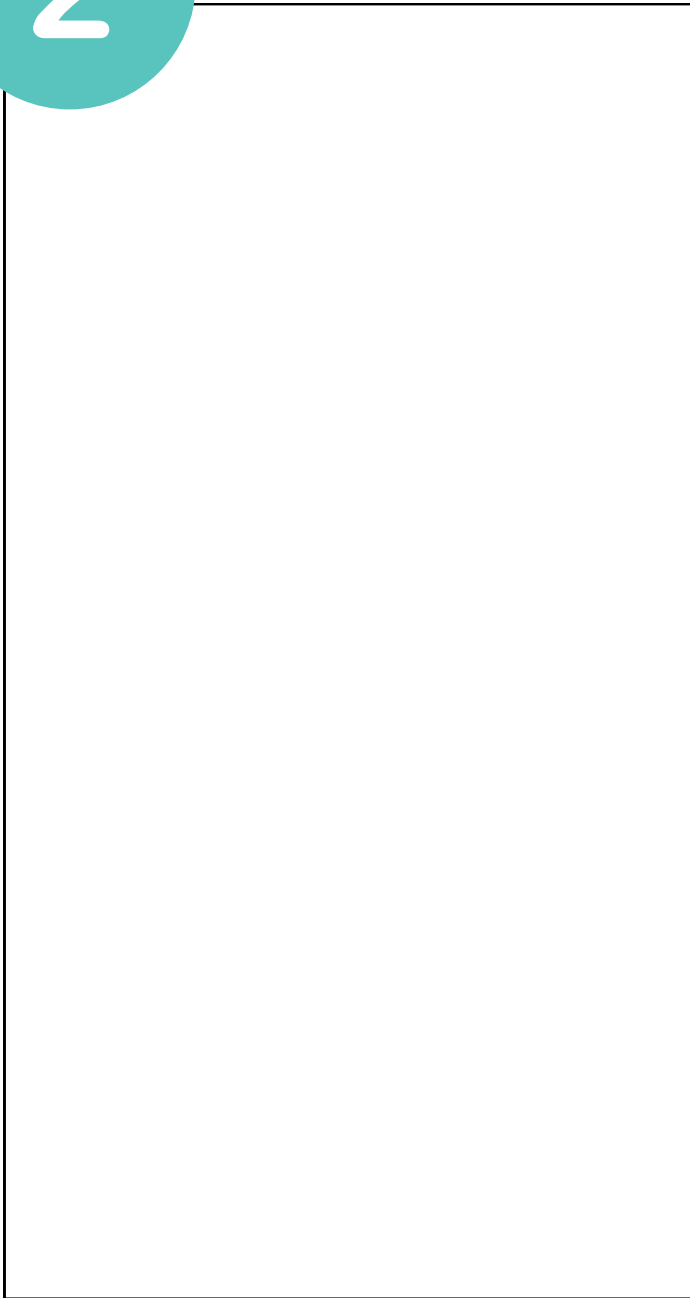
Name 3 of your heroes and what makes them a hero to you.



What are some family recipes you want to make sure you leave to your children and grandchildren? Share any personal memories such as who taught you this recipe, or who you shared it with and when you enjoyed it.

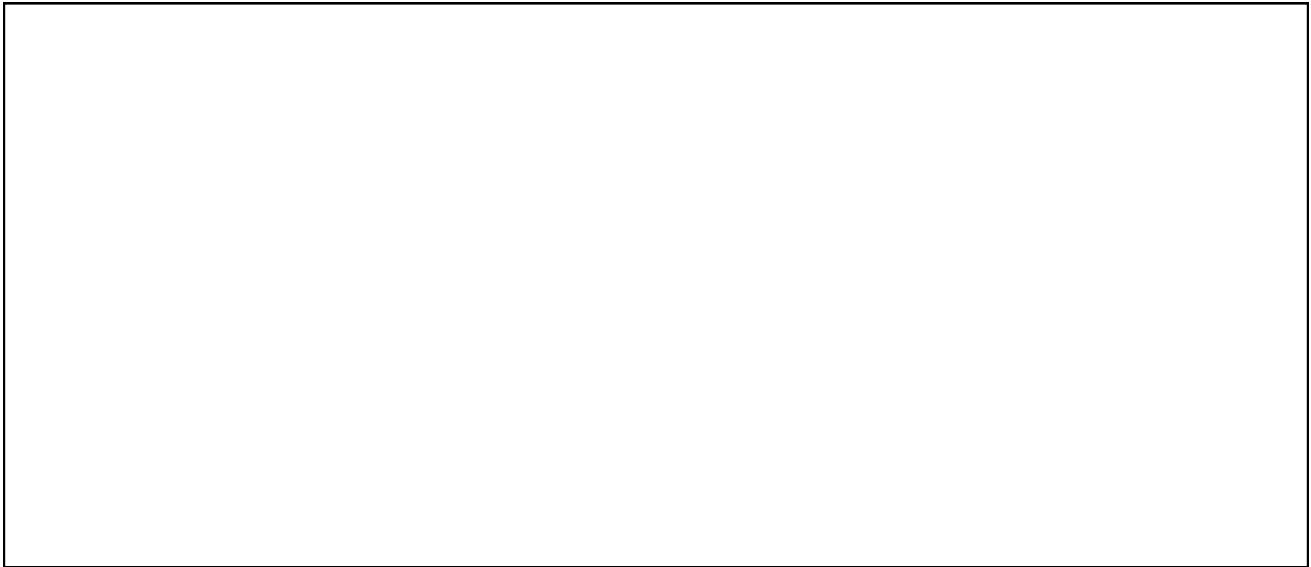
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family recipes

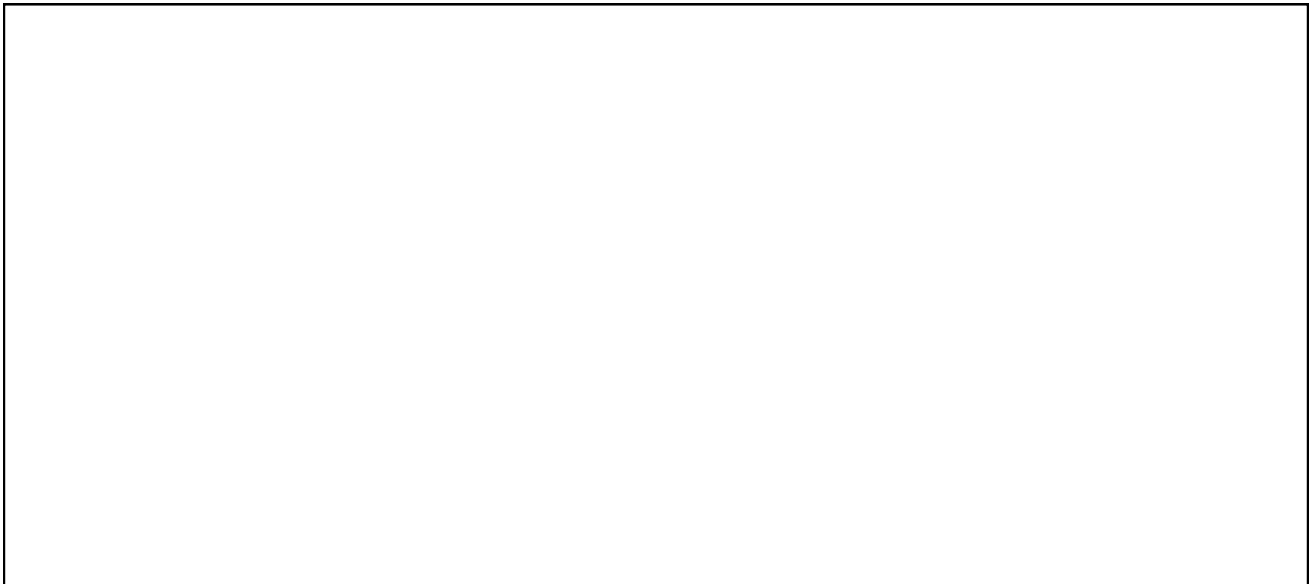


Do you have any family stories you would like to share?

Share a story about your parents

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Share a story about your grandparents

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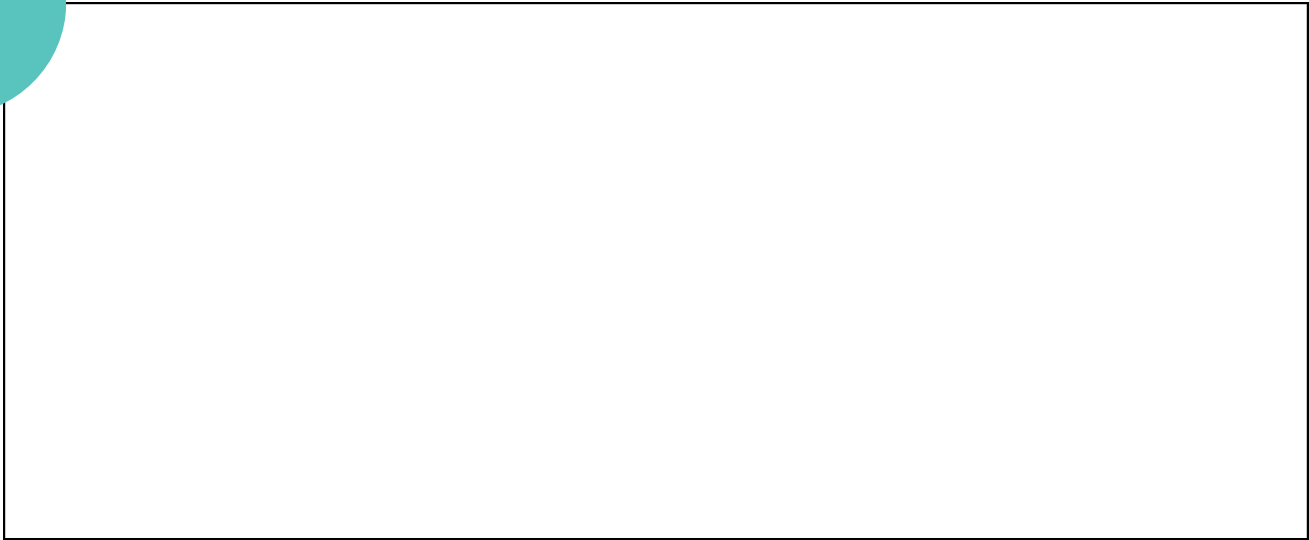
What advice would you give your younger self that might help a young person growing up today?

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How do you want your wealth and the money you've earned to impact your family members and the causes you love and support?


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Causes you support financially



2

Ways you hope your wealth will impact your family



Was there anyone you want to honor that had an impact on your life?

Who has impacted your life? Can you share a story about them below?



How do you wish to honor this person?



Are there any other important ideas or messages that you would like to share?

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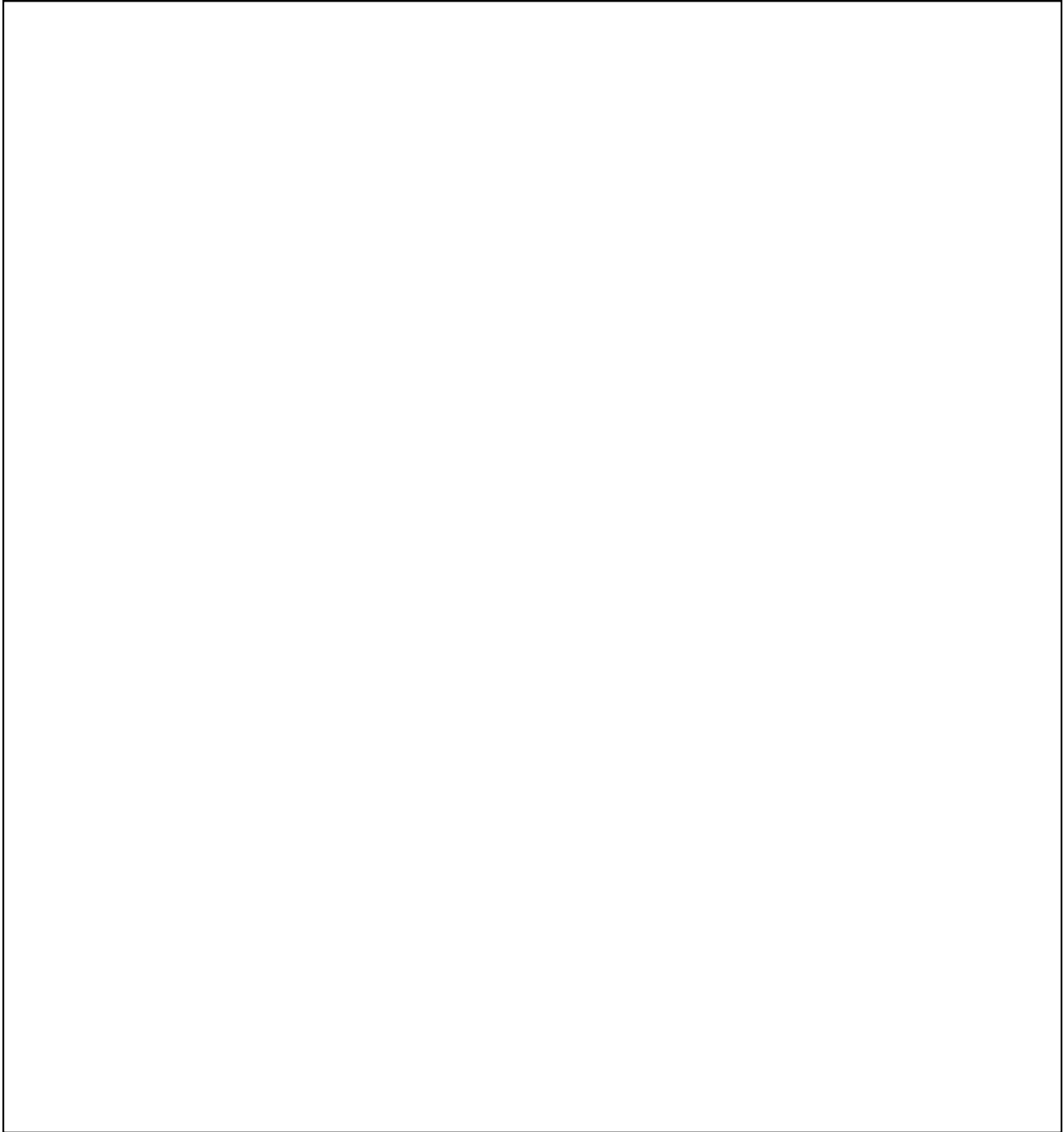
What are some of your favorite quotes, Bible verses, proverbs, or other pieces of advice and wisdom that you would like to share?

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Pieces of advice and wisdom.

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How would you like to be remembered?

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What are some of your favorite things?

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Name 5 of your favorite things

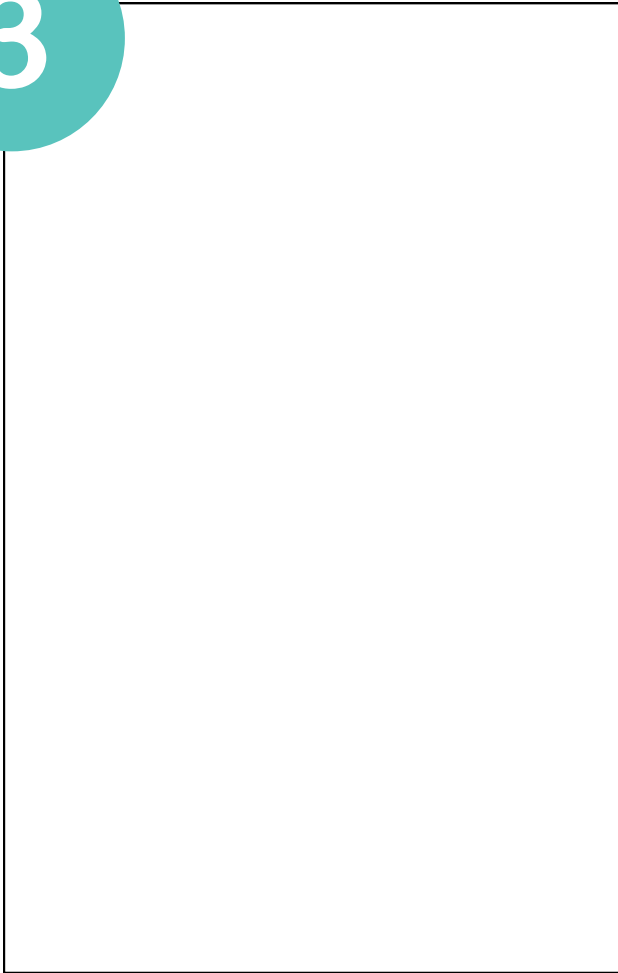
What are a few of your hopes and dreams? Did you accomplish all of your dreams? How have you contributed to the world?

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Is there any books, poems, or experiences you would like to recommend?

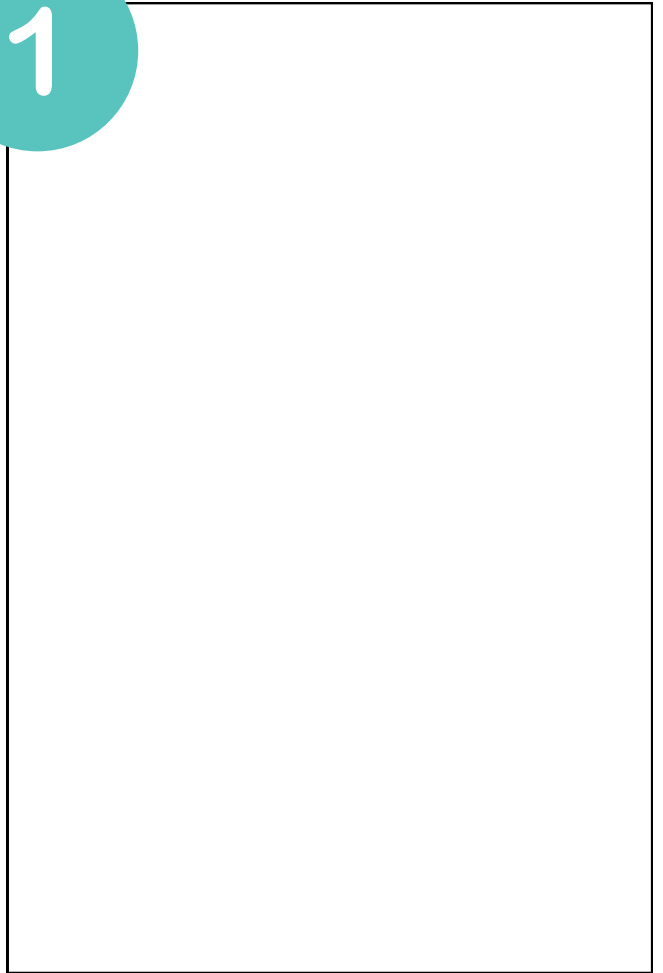
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Favorite books



1

Favorite Poem



4

Experiences you recommend

