



Your Workbook

Estate & Legacy Planning

HOW TO KEEP YOUR FAMILY
OUT OF COURT AND CONFLICT

3 WAYS TO GET MASSIVE VALUE

FROM THIS WORKBOOK

01

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.

02

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**.

03

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

01

Planning for "it" will _____
_____.

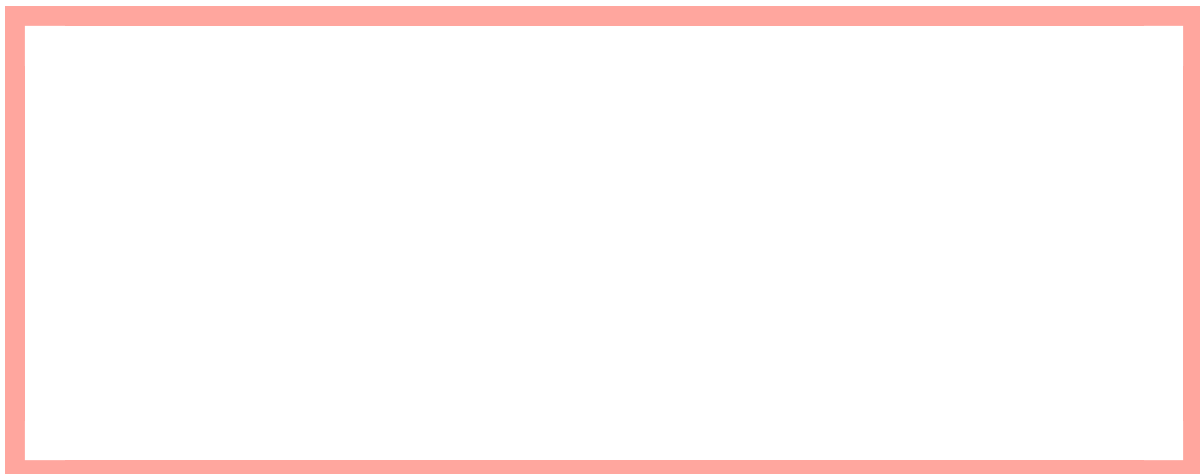
02

It will _____
too _____.

03

I'm not _____ enough
or _____ enough.

IDEAS, INSIGHTS AND ACTION ITEMS



THE REALITY IS...

Estate planning is not about

_____.

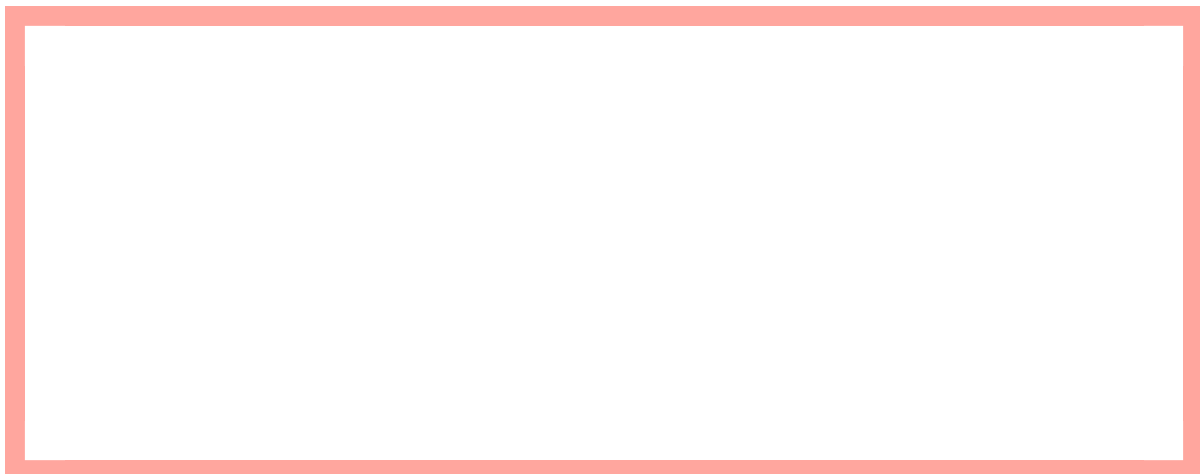
It is about the people you

_____.

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

01

_____ court is required.

02

_____ and

override your will.

03

A _____
is a will substitute.

IDEAS, INSIGHTS AND ACTION ITEMS



EMERGENCY SITUATION

SAD DAY NO. 02

01

_____ guardianship is just as important as who raises your kids.

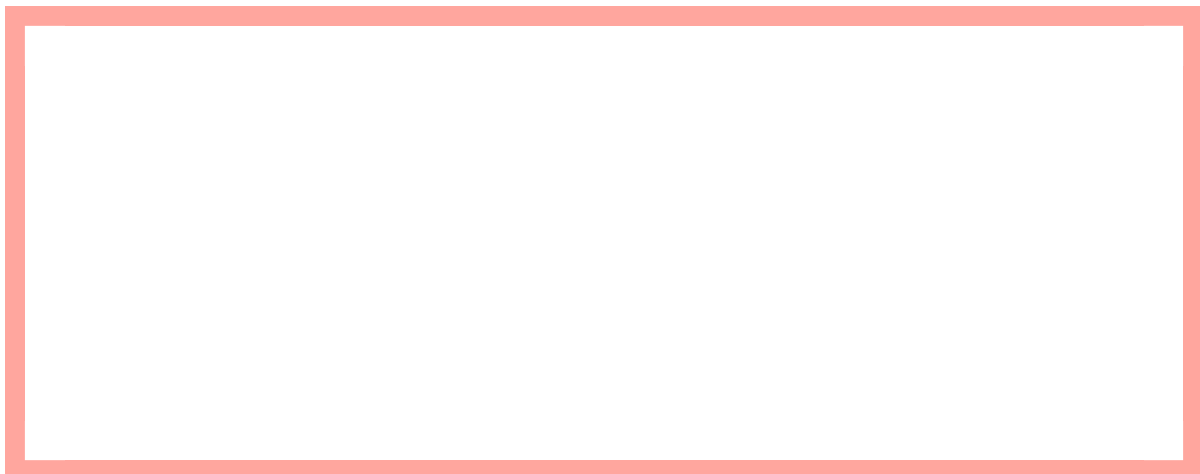
02

Only _____ are the default temporary guardians.

03

Your plan _____ unless you share it with others.

IDEAS, INSIGHTS AND ACTION ITEMS



ADULT IS INCAPACITATED

SAD DAY NO. 03

01

Your doctors cannot talk to anyone about your condition without _____.

02

Your medical decisions are made by _____ by default.

03

It does not make a difference if you are _____.

IDEAS, INSIGHTS AND ACTION ITEMS



A PARENT PASSES AWAY

SAD DAY NO. 04

01

When to _____
is decided as a group.

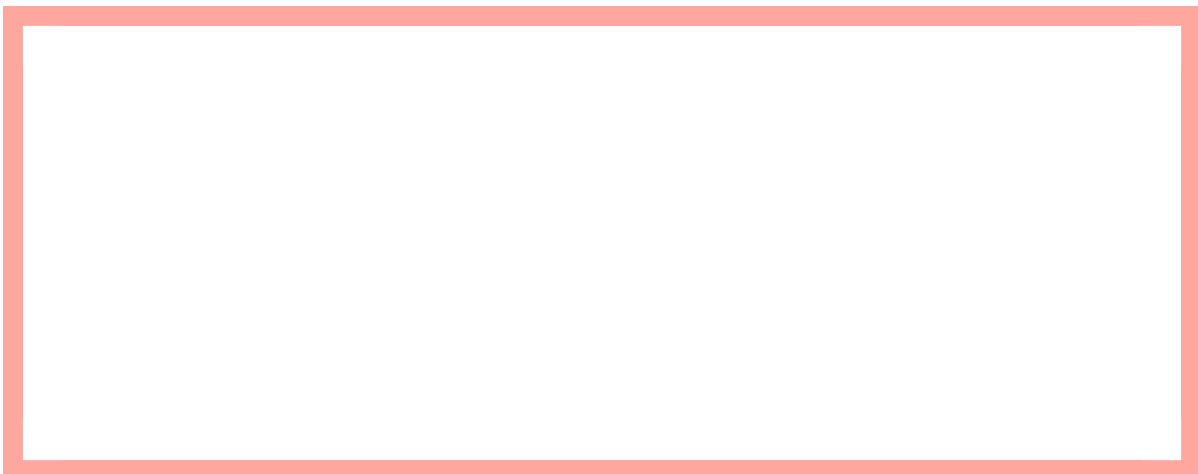
02

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

03

Out-of-_____ real estate
means _____ probate .

IDEAS, INSIGHTS AND ACTION ITEMS



YOUNG ADULTS (& THE IRS) INHERIT

SAD DAY NO. 05

01

The _____
comes before your children and heirs.

02

With _____,
your children and heirs have no financial
guidance.

03

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

IDEAS, INSIGHTS AND ACTION ITEMS



WHAT MATTERS MOST

BONUS LESSON

01

Your _____

02

Your _____

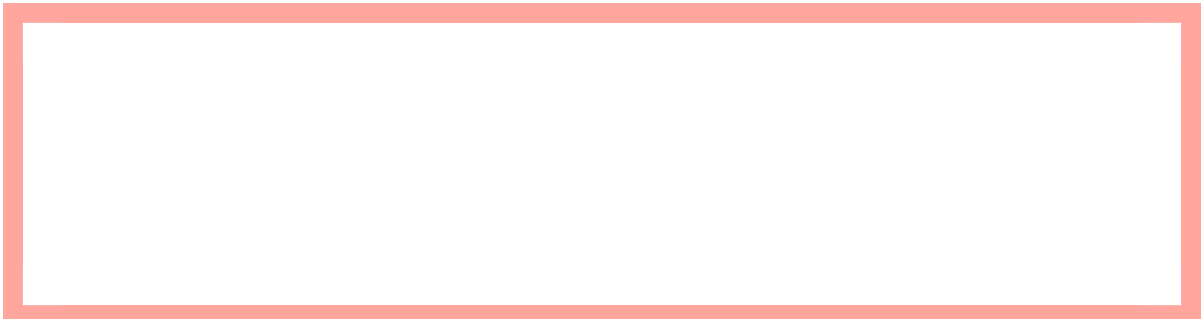
03

Your _____

04

Your _____

IDEAS, INSIGHTS AND ACTION ITEMS



HOW YOU TAKE ACTION TODAY

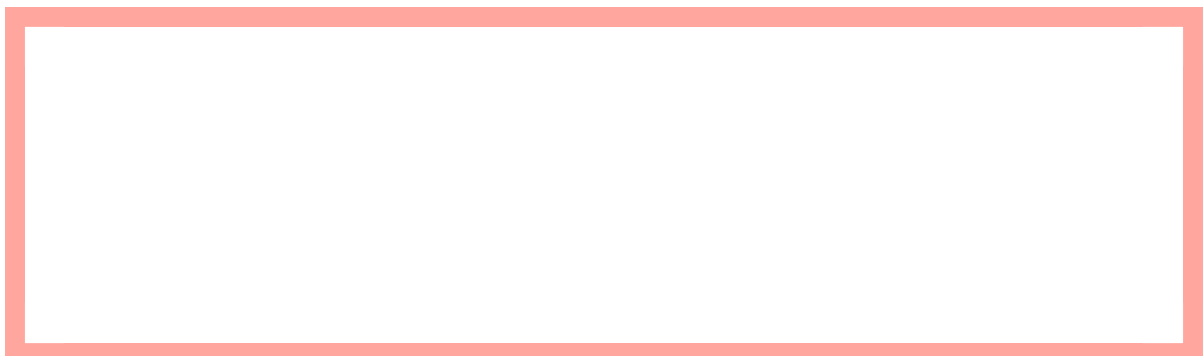
BEFORE IT'S TOO LATE

Schedule your Family Wealth 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