
Your family. Your questions. Your next step.

Self-Guided Family Legacy Review™

A complimentary review to help you consider what matters to your family, understand your arrangements, and identify questions or next steps.

If something happened to you unexpectedly, how would you want things to go for your family?

Whether you haven't started, have a will, or already have a trust, begin wherever you are. Complete this at your own pace, with your spouse or partner, or with a Claim My Legacy Legacy Specialist during a complimentary 60-minute appointment.

Your name(s)

Date and state where you live

Legacy Specialist who shared this review with you

Your Legacy Specialist's phone or email

How to use this workbook

Download and save your own copy before entering answers. Open it in a PDF reader that supports fillable forms, such as Adobe Acrobat Reader. Save as you go, close and reopen to check your answers, or print and write by hand. Keep answers brief enough to remain visible when printed. Use extra paper for longer notes.

"I'm not sure" is a useful answer. You may leave a question blank or write "Discuss privately." Keep passwords, account numbers, and sensitive identifiers out of this workbook. Your answers stay in your saved copy; this PDF does not submit them automatically.

No pressure. No obligation.

1 | Let's start with your family

Before considering documents, trusts, wills, or assets, take a moment to think about what matters most. If you complete this together, give each person time to answer.

What prompted you to begin this review?

Before a workshop: What would you most like to learn? After a workshop: What stood out or raised questions?

Who are the people you most want to protect? What would you want your planning to accomplish for them?

If something happened to you unexpectedly, how would you want things to go for your family? What would you want to make sure happens?

More than anything, I want my family to...

1 | Your priorities, continued

Keep your most important priority nearby as you continue. It can help you choose which questions and next steps matter most.

What would you want your family to avoid?

Consider probate or unnecessary court involvement, delays accessing money or property, family disagreements, uncertainty about your wishes, someone you did not choose making decisions, problems involving minor children, or confusion about property.

Which of these concerns matter to you, or is there something else you would like to explain?

Why does this matter to you and the people you love?

If you are completing this together, where do your priorities overlap or differ?

2 | Your family today

Make a note of your spouse or partner, children, grandchildren, and anyone else you want to provide for. Use first names or relationships if you prefer.

Person / relationship	Minor?	Depends on you?	Circumstances to consider
Person 1 	☐	☐	
Person 2 	☐	☐	
Person 3 	☐	☐	
Person 4 	☐	☐	
Person 5 	☐	☐	

What circumstances deserve special attention?

Consider children from a previous relationship, disability or ongoing support needs, help managing an inheritance, strained relationships, someone you do not want involved in decisions, a spouse or partner who is not a United States citizen, or another circumstance important to you.

What would you like considered? You may write “I would like to discuss this privately.”

When I think about the people who would depend on my plan, I would like to understand...

2 | Who would you trust to step in?

Record your preferences and what you know today. Naming someone in this workbook does not appoint them to a legal role.

Responsibility	First choice	Backup	Discussed? / recorded in documents?
Financial matters			
Health care decisions			
Carrying out wishes after death			
Guardian of minor children, if applicable			

What would you want these people to understand about your wishes or responsibilities?

What questions do you have about your choices or how they are recorded?

3 | What planning do you have today?

For each item, enter Yes, No, or I'm not sure. If you have it, note where it is and when it was last reviewed. You do not need to interpret your documents to complete this section.

Document / arrangement	Yes / No / unsure	Location / last reviewed
Revocable living trust		
Will		
Financial or durable power of attorney		
Health care power of attorney		
Living will or advance directive		
HIPAA authorization		
Guardian instructions		
Digital asset authorization		
Account / insurance beneficiary designations		

About the planning I already have, or still need to begin, my biggest question is...

3 | What has changed?

If you have not begun planning, use this page to record questions about getting started.

If you have a trust: When was it created and last reviewed? Which assets do you know are titled in its name? Were funding steps left for you, and do you know whether they were completed?

Changes to consider

Marriage or divorce; birth or adoption; death of someone named in your plan; purchase or sale of property; a move to another state; business or financial changes; beneficiary relationships; or changes in whom you want making decisions.

What has changed since your planning was completed?

How confident are you that your current arrangements support what you want for your family? What gives you that confidence?

If something remains unclear, what would understanding it allow you to do? Would you like help exploring it?

4 | Your home, savings, and other assets

You do not need account numbers or exact balances. Think about your home, other real estate, bank accounts, investments, retirement accounts, life insurance, business interests, vehicles, and significant belongings.

For each asset, note whom you want to receive it, how it is owned or whether a beneficiary is named, and what you understand about how it would reach that person. Where uncertain, write “I would like to confirm this.”

Asset / category	Intended recipient	Ownership / beneficiary	Transfer process / what confirmed
Asset 1 			
Asset 2 			
Asset 3 			
Asset 4 			
Asset 5 			
Asset 6 			

Additional assets or questions to record separately

4 | What does this mean for your family?

Different assets may use different transfer arrangements. Having a trust document does not, by itself, tell you how every asset will transfer.

If you have a trust: Which assets do you know are connected to it, and how was that confirmed? Are there assets you intended to include but are unsure about?

Real estate in another state: Where is it located, and what would you like to understand about its transfer?

Which transfer arrangements feel clear? Which would you like help confirming?

If an arrangement differed from what you intended, how might that affect the person receiving the asset? What would a clear answer allow you to do?

The asset transfer question I most want answered is...

5 | If someone needed to step in

Think about how your family would manage if you could not handle things yourself. Record what you understand today and what you would like clarified.

Finances: Who could step in? What arrangements would allow them to act? Do they know their role and where to find information?

Health care: Who would you want speaking for you? Have you discussed your wishes? Where are the documents, and could that person access them?

After your death: Who would carry out your wishes? Would they know where to begin, whom to contact, and where documents are kept? How have you helped them prepare?

Where might your chosen people need more information or guidance?

5 | Would your family know where to begin?

Record locations and organizing tasks, rather than passwords or account numbers.

Information	Where kept / who knows / what needs organizing
Estate planning documents	
Accounts, property, insurance and obligations	
Important professional contacts	
Digital access instructions	
Care wishes and family responsibilities	
Documented guardian choices, if applicable	

If the information were organized and questions answered, what difference would that make for your family?

One thing I would like to make easier for the people I depend on is...

6 | Your Family Protection Checkup™

This is a picture of your understanding today. You do not need to grade yourself or resolve every question.

Use one response per area:

A = I understand my arrangements.

B = I would like to review or confirm this.

C = I have not addressed this yet.

D = This does not apply to me.

Area	A / B / C / D	What supports your understanding / question
Estate planning documents		
Asset transfers / possible probate 		
Trust funding, if applicable		
Home and other real estate		
Beneficiary designations		
Financial decision-maker		
Health care decision-maker		
Guardianship, if applicable		
Important digital information		
Family knows where things are kept		
Chosen people understand their roles		

Which question matters most to you, and why?

6 | What stands out to you?

Look back at the outcome you described in Section 1 and the arrangements you understand today.

Which answers fit the outcome you want for your family?

Where do you see a difference between what you want and what you currently understand about your arrangements?

Would you prefer to gather information yourself, talk with your Legacy Specialist, or involve another professional?

If you could clarify one thing first, what would make the greatest difference for your family?

After completing this checkup, the first thing I want to address is...

7 | What would useful help look like?

Now think about what would help you move forward.

If you resolved the questions you identified, what would be different for you and your family? Describe a useful outcome.

Claim My Legacy's approach brings together four areas:

Documents: Understand the planning documents and appropriate next steps.

Funding: Understand how assets connect with your plan and steps needing attention.

Organization: Bring documents and information together so they can be found.

Family: Prepare chosen people to understand their responsibilities and where to begin.

Which areas connect most closely with your discoveries? What would you want help understanding or completing?

What has kept this on the back burner? What would you need clarified about process, cost, time, whom to trust, or where to start?

Who would you want involved in the next conversation? What would you want them to understand?

Would it be useful to talk with your Legacy Specialist and see how Claim My Legacy could help? You do not need to choose a service beforehand. Explore services and costs before deciding.

8 | Your personal review summary

Bring your discoveries together so you can choose what to do next.

The people I most want to protect are...

What I most want my planning to accomplish is...

The arrangements I understand best are...

The questions I still want answered are...

The help I would find most useful is...

8 | My First Three Steps™

Choose three practical actions. You might locate documents, confirm ownership or a beneficiary, speak with someone you have chosen, attend a workshop, or arrange a conversation.

Step 1: What will I do first? Include who can help and when you intend to begin.

Step 2: What will I do next? Include who can help and when you intend to begin.

Step 3: What will help me continue? Include who can help and when you intend to begin.

Which steps would you like help completing?

Continue with your Legacy Specialist

"I completed the Family Legacy Review. My main priority is [your priority], and I would like to understand [your question]. Can we arrange a time to discuss my next steps?"

Contact the Specialist named on the first page, or use the Request a Conversation form and include their name. If you do not have a Specialist, Claim My Legacy can help you get connected.

Request a Conversation online

Save your workbook. Share it only if you choose, or bring the questions you wish to discuss.

Completing this review identifies priorities and questions; planning and funding actions still need to be carried through.

No pressure. No obligation.