



CLAIM
MY
LEGACY

FAMILY LEGACY REVIEW™

*A Guided Review of Your Family,
Your Assets & Your Plan*



“The people you love deserve
more than good intentions.
They deserve a plan.”

FAMILY NAME(S): _____

DATE: _____

LEGACY SPECIALIST: _____

WE DO MORE THAN JUST DOCUMENTS.
We protect the people you love most.

Before we talk about documents, trusts, wills, or assets, let's talk about what matters most.

What brought you to the Claim My Legacy workshop?

After attending the workshop, what concerned you most?

Who are the people you most want to protect?

If something happened to you tomorrow, what would you want to make sure happens?

Is there anything you absolutely do NOT want your family to experience?

☐ Probate or unnecessary court involvement

☐ Delays accessing money or property

☐ Someone I didn't choose making decisions

☐ Problems with my home or other property

☐ Family disagreements

☐ Uncertainty about my wishes

☐ Problems involving minor children

☐ Other: _____

LEGACY SPECIALIST NOTES

Understanding the people involved helps us understand what your plan needs to accomplish.

Marital / Relationship Status: _____

Spouse / Partner: _____

Is either spouse / partner not currently a United States citizen? ☐ Yes ☐ No ☐ Unsure

LEGACY SPECIALIST NOTE: A Yes or Unsure answer requires appropriate attorney and tax review. Do not determine whether a specialized trust or tax strategy is needed.

CHILD / FAMILY MEMBER	AGE	RELATIONSHIP / SPECIAL CONSIDERATIONS

☐ Grandchildren? ☐ Yes ☐ No

☐ Any beneficiaries who are minors? ☐ Yes ☐ No

☐ Special circumstances affecting someone you want to provide for? ☐ Yes ☐ No

☐ Anyone you intentionally do NOT want involved? ☐ Yes ☐ No

If yes to either of the last two questions, what should we know?

WHO WOULD YOU TRUST TO STEP IN?

Financial matters: _____

Healthcare decisions: _____

After your death / Trustee: _____

Guardian for minor children, if applicable: _____

3 | WHAT PLANNING DO YOU HAVE TODAY?

FAMILY LEGACY REVIEW™

Let's look at what is already in place. The goal is not to grade the documents, but to identify anything that may need attention.

PLANNING DOCUMENT	YES	NO	UNSURE	CURRENT?
Revocable Living Trust	☐	☐	☐	☐
Will	☐	☐	☐	☐
Financial / Durable Power of Attorney	☐	☐	☐	☐
Healthcare Power of Attorney	☐	☐	☐	☐
Living Will / Advance Directive	☐	☐	☐	☐
HIPAA Authorization	☐	☐	☐	☐
Guardianship Instructions	☐	☐	☐	☐
Digital Asset Authorization	☐	☐	☐	☐
Beneficiary Designations Reviewed	☐	☐	☐	☐

If you have a trust, when was it created? _____

When was it last reviewed? _____

IS YOUR TRUST FUNDED?

☐ Yes ☐ No ☐ Partially ☐ I'm not sure

☐ Do you know which assets are actually titled in your trust? ☐ Yes ☐ No ☐ Unsure

☐ Do you know who your current beneficiaries are on your major accounts? ☐ Yes ☐ No ☐ Unsure

Major life changes since your documents were created:

- ☐ Marriage
- ☐ Divorce
- ☐ Birth / adoption
- ☐ Death in the family
- ☐ New home / property
- ☐ Business change
- ☐ Significant financial change
- ☐ Beneficiary relationship changed
- ☐ None
- ☐ Other: _____

4 | YOUR ASSET TRANSFER SNAPSHOT

FAMILY LEGACY REVIEW™

We don't need account numbers or exact balances today. We are looking at how each significant asset would transfer.

ASSET	APPROX. VALUE	HOW OWNED / BENEFICIARY	TRANSFER PATH CLEAR?
Primary Residence	\$_____	_____	☐
Other Real Estate	\$_____	_____	☐
Bank Accounts	\$_____	_____	☐
Investments	\$_____	_____	☐
Retirement Accounts	\$_____	_____	☐
Life Insurance	\$_____	_____	☐
Business Interests	\$_____	_____	☐
Vehicles	\$_____	_____	☐
Other Significant Assets	\$_____	_____	☐

ASK FOR EACH SIGNIFICANT ASSET

“If you passed away tonight, do you know exactly who receives this asset and how they receive it?”

- ☐ Yes, for most assets ☐ For some assets ☐ No ☐ I'm not sure
- ☐ Real estate owned outside your home state? ☐ Yes ☐ No
- ☐ Assets you believe are in your trust but aren't completely sure? ☐ Yes ☐ No ☐ Unsure

LEGACY SPECIALIST NOTES

Documents matter because life happens. Walk through these situations conversationally and record what the family believes would happen today.

If you became unable to make financial decisions tomorrow, who could legally step in?

☐ Clear ☐ Needs Review ☐ Unknown

If you couldn't make your own healthcare decisions, who would speak for you?

☐ Clear ☐ Needs Review ☐ Unknown

If you passed away unexpectedly, who would be responsible for carrying out your wishes?

☐ Clear ☐ Needs Review ☐ Unknown

☐ Would your family know where your important documents are? ☐ Yes ☐ No ☐ Probably not

☐ Would they know what accounts, insurance, property and obligations exist? ☐ Yes ☐ No ☐ Unsure

☐ Would they understand your wishes? ☐ Yes ☐ No ☐ Somewhat

☐ If you have minor children, is your choice of guardian documented? ☐ Yes ☐ No ☐ N/A

LEGACY SPECIALIST NOTES

HERE'S WHAT WE DISCOVERED TOGETHER

Complete this section from today's conversation. It is a picture of where things stand today, not a grade.

AREA	PROTECTED	NEEDS REVIEW	NOT ADDRESSED
Estate Planning Documents	☐	☐	☐
Avoiding Unnecessary Probate	☐	☐	☐
Trust Funding	☐	☐	☐
Home / Real Estate Transfer	☐	☐	☐
Beneficiary Designations	☐	☐	☐
Financial Decision-Maker	☐	☐	☐
Healthcare Decision-Maker	☐	☐	☐
Minor Children / Guardianship	☐	☐	☐
Digital Assets	☐	☐	☐
Family Knows Where Everything Is	☐	☐	☐
Wishes Clearly Communicated	☐	☐	☐

NUMBER OF AREAS IDENTIFIED FOR REVIEW: _____

The purpose of your Family Legacy Review™ is to identify areas that deserve attention before your family is forced to deal with them during a crisis.

YOUR PRIORITIES

1. _____
2. _____
3. _____

AREAS IDENTIFIED FOR REVIEW

- | | |
|--|--|
| ☐ No current estate plan | ☐ Will-only planning |
| ☐ Existing documents may need updating | ☐ Trust may not be fully funded |
| ☐ Real estate transfer needs review | ☐ Beneficiary designations need review |
| ☐ Healthcare authority needs attention | ☐ Financial authority needs attention |
| ☐ Guardianship planning needs attention | ☐ Digital assets need attention |
| ☐ Family doesn't know where everything is | ☐ Wishes have not been clearly communicated |
| ☐ Other: _____ | |

LEGACY SPECIALIST NOTES

You now know more about your family's situation than you did when you walked into the workshop.

WHAT SHOULD HAPPEN NEXT?

☐ NO IMMEDIATE ACTION IDENTIFIED

Current planning appears to address the family's primary concerns. Continue reviewing after significant life changes.

☐ EXISTING PLAN SHOULD BE REVIEWED

Documents, beneficiaries, ownership or funding may need additional review.

☐ PLANNING GAPS NEED TO BE ADDRESSED

Today's review identified areas where additional planning may help protect the family.

☐ READY TO MOVE FORWARD

The family would like Claim My Legacy to help them take the next steps.

THE CLAIM MY LEGACY™ DIFFERENCE

DOCUMENTS

FUNDING

ORGANIZATION

FAMILY

Your plan may include: Living Trust • Pour-Over Will • Financial & Healthcare Powers of Attorney • Living Will / Advance Directive • HIPAA Authorization • Digital Assets Authorization • Certificate of Trust • Guardianship provisions when applicable

PLUS Legacy Binder™ • Trust-Funding Guidance • Family Protection Review • A Plan Your Family Can Use

LOCAL ATTORNEY ESTATE PLANNING

\$4,500+*

CLAIM MY LEGACY™ COMPLETE PACKAGE

\$1,995

The difference isn't just what you pay. It's what your family receives.

*Estate planning fees vary by attorney or provider, plan complexity, family circumstances and services included. \$4,500+ reflects local pricing observed by Claim My Legacy and is not intended to represent the fees charged by every attorney.

LEGACY SPECIALIST CONVERSATION

“When we started today, our goal wasn’t to sell you documents. It was to find out what would actually happen to the people and things you care about if something happened to you.”

“Based on everything we’ve discovered today, would you like us to help you get this taken care of?”

☐ Schedule planning appointment

☐ Gather additional documents / information

☐ Follow-up needed

☐ Begin estate planning process

☐ Review existing trust / documents

☐ No action at this time

Follow-up Date: _____

Legacy Specialist: _____

Claim My Legacy is not a law firm. This review is educational and intended to identify areas that may warrant further consideration. Legacy Specialists do not provide legal advice. Legal, tax, financial or other professional guidance should be obtained from qualified professionals when appropriate.