



CLAIM MY LEGACY™
ESTATE PLANNING



UNDERSTAND IT → GET IT DONE → MAKE IT WORK.

MY FIRST THREE STEPS™

A Simple Action Guide to Getting Started

Three practical actions.

Estate planning does not have to be complicated.
This worksheet helps you focus on what matters most and choose
three practical actions that move you and your family forward.
You do not need to do everything at once. You just need the right next steps.

ABOUT YOU

FULL NAME

DATE

PHONE

EMAIL

DECIDE - ORGANIZE - ACT

Understand what matters. Put the important pieces in order.
Then take the next practical step.

LEGACY READINESS

Use this quick review to see what may deserve attention.

QUESTION	YES	NEEDS ATTENTION
Documents are current	☐	☐
Right people know where documents are	☐	☐
Trustee / agents are current	☐	☐
Beneficiary designations reviewed	☐	☐
Major assets documented	☐	☐
Trust funding reviewed	☐	☐
Healthcare wishes documented	☐	☐
Family knows who to contact	☐	☐
Digital access plan exists	☐	☐
Personal letter started or completed	☐	☐

What stands out after this review?



STEP 1 DECIDE

Choose what matters most right now.

1

MY FIRST STEP IS TO:

WHY THIS MATTERS:

TARGET DATE:

2

MY SECOND STEP IS TO:

WHY THIS MATTERS:

TARGET DATE:

3

MY THIRD STEP IS TO:

WHY THIS MATTERS:

TARGET DATE:

Small steps create clarity.

Choose actions you can actually take, then give each one a date.

STEP 2 ORGANIZE

Put the important pieces in order.

A. WHO SHOULD ACT FOR ME?

If you couldn't make decisions, who should act for you?

PRIMARY

ALTERNATE

B. WHAT DOES MY FAMILY NEED TO FIND?

List important items, locations, or information your family may need.

1

2

3

C. WHAT IS MY NEXT APPOINTMENT, DOCUMENT, CONVERSATION, OR FUNDING STEP?

What is the one next action you will take or schedule?

TARGET DATE:

WITH WHOM:

The next step does not have to be the whole plan.

It only needs to move you forward.

STEP 3 ACT

Choose the next practical action.

Three steps are enough to begin.

Decide what matters, organize what your family may need, and take the next practical action.

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