



**CLAIM
MY
LEGACY**

Will Your Family Know What to Do?

Five Simple Steps to Help Your Loved Ones Find What They Need, Understand Your Wishes, and Know Where to Turn.

A practical guide with questions, checklists, and room to write.

Love deserves a plan.

UNDERSTAND IT > GET IT DONE > MAKE IT WORK

Give your family a clearer place to start.

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

You may already have documents. You may be thinking about creating them. Either way, there are practical steps you can take to help the people you love understand your wishes and find the information they need.

You do not have to finish everything today. Start with one question, one conversation, or one missing piece of information.

Your five steps

1. Prepare the people you have chosen to act for you.
2. Make important information easy to find.
3. Help your family understand your wishes.
4. Leave the story behind your legacy.
5. Identify what still needs attention.

Use this booklet privately. Write locations and contact names rather than passwords, account numbers, or other sensitive details. Keep the completed booklet in a secure place.

This guide is educational and is not legal, tax, or investment advice. Your notes support conversations; they do not create or change an estate plan. Ask an appropriate professional about your circumstances.

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Prepare the people you have chosen to act for you.

Naming someone is the beginning of preparing them to help.

Your estate plan may name different people to act for you. One person may serve in several roles, but each role has its own responsibilities.

Successor trustee: Manages trust assets when the trust calls for them to take over.

Financial power of attorney agent: Handles financial matters within the authority granted.

Health care decision-maker: Makes medical decisions when authorized and needed.

Executor or personal representative: Handles estate administration after death.

Your family may need help while you are still living. If you could not speak for yourself or manage your affairs, would the people you selected know your wishes?

- ☐ Have I spoken with each person about the responsibility?
- ☐ Have they agreed, and are they comfortable asking questions?
- ☐ Do they know where to find the relevant documents?
- ☐ Do they know whom to contact for guidance?
- ☐ Have I considered a backup if my first choice cannot help or be reached?

A conversation starter:

"I have been thinking about how to make things easier for our family. Would you be comfortable talking about a role I would like you to consider?"

The person I need to talk with first:

A conversation alone does not give someone legal authority. Confirm that the appropriate documents name the intended people and address the responsibilities involved.

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Make important information easy to find.

Your family needs a starting point, not a scavenger hunt.

Create a simple map of where important information is kept. You can identify the location without putting sensitive details in this booklet.

- ☐ Estate planning documents and any later updates
- ☐ Health care instructions and emergency contacts
- ☐ A list of financial institutions, insurance providers, and regular bills
- ☐ Contact information for relevant professionals
- ☐ Property records and other important household information
- ☐ A secure method for handling digital accounts, photos, and files

My important documents are located:

The person who knows how to find them:

One action today: Tell a trusted person where to find your information and how to access it appropriately. Keep security and privacy in mind.

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Help your family understand your wishes.

You can explain what matters without sharing every private detail.

Families differ. Some conversations work best together; others are better held privately. Consider what the people helping you need to understand and what you feel comfortable discussing.

- ☐ Have I explained my priorities and important wishes?
- ☐ Are there decisions that could surprise someone?
- ☐ Have relationships, health, or circumstances changed?
- ☐ Are there questions I should discuss with a professional before talking with family?

A conversation starter:

"I want you to understand what matters to me and where to turn if you need help. We do not have to discuss every financial detail today."

One thing I want my family to understand:

Explain your intentions in your own words, then confirm that your legal documents reflect those intentions. Family discussions do not replace formal document updates.

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Leave the story behind your legacy.

Your family can inherit more than property. They can carry your story forward.

Consider a personal letter, a voice recording, or a short video. Share what you learned, what mattered to you, and what you hope your loved ones remember.

What do I most want my family to remember?

What did it take to build the life and legacy I am leaving?

What hopes or encouragement would I like to share?

Label personal messages as personal messages. Keep legal distribution instructions in the appropriate estate planning documents.

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Identify what still needs attention.

A useful review ends with a next action.

Choose the description that feels closest to your situation. You can select more than one.

- ☐ I need help getting started with an estate plan.
- ☐ I have a will and want to understand my options.
- ☐ I have a trust and want to review how my assets connect to it.
- ☐ I need to check whether my documents still reflect my wishes.
- ☐ My documents are organized, but the people I selected need preparation.
- ☐ I am ready to start my estate plan.

The most important question I want answered:

Your next step should fit your situation.

You can review where you stand, talk with a Legacy Specialist, review trust funding, or begin your estate plan. The links and QR codes on pages 10 and 11 give you those choices.

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Does your family know what to do?

Mark what you have addressed. Leave unfinished items open for follow-up.

- ☐ The people I selected know their intended roles.
- ☐ I have discussed their willingness and availability.
- ☐ I have identified a backup if my first choice cannot help or be reached.
- ☐ A trusted person knows where to find my documents.
- ☐ My professional and emergency contacts are organized.
- ☐ I have a secure approach to important digital information.
- ☐ I have discussed wishes that need explanation.
- ☐ I know whether document changes need professional attention.
- ☐ I have considered a personal legacy message.
- ☐ I have confirmed how important assets and beneficiary designations fit with my estate plan.
- ☐ I have identified my next action.

An unchecked box is useful information.

It helps you see what to address next. This checklist is not a test of whether your legal estate plan is complete.

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Turn your answers into action.

One thing I will do first:

Who I need to speak with:

The question I will ask:

When I will take this step:

Review this information periodically and after important changes, such as a death, marriage, divorce, move, new asset, or change in health or relationships. Ask whether your documents need attention too.

Last reviewed: _____ Next review: _____

Keep this booklet for yourself. You can bring your questions to a Legacy Specialist without sending sensitive financial information.

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Would you like help understanding where you stand?

Claim My Legacy helps families understand the subject, take the next step, and prepare their loved ones to use what they create.



Complete your Family Legacy Review™

Use the complimentary Self-Guided Family Legacy Review at your own pace to organize your questions and see what needs attention.

<https://www.claim-my-legacy-estate-planning.com/flr/self-guided-family-legacy-review>



Request a conversation

Talk with a Legacy Specialist about your questions and possible next steps.

<https://www.claim-my-legacy-estate-planning.com/flr/self-guided-family-legacy-review/flr-request-a-conversation>

Ready to begin? Turn to page 11 for the direct Start Your Estate Plan link. You do not have to complete the review first.

On paper, scan with your phone camera. On screen, click the linked heading or web address.

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Take the next step that fits you.



Start Your Estate Plan

Ready to create your trust-based estate plan? Go directly to the Claim My Legacy platform to begin.

<https://ClaimMyLegacy.com>



Trust Funding Review™

Already have a trust? Review questions about asset ownership, beneficiary arrangements, and the follow-through your plan may need.

<https://www.claim-my-legacy-estate-planning.com/trust-funding-review>

Bring the question that matters most to you.

“How can I make this easier for my family?” is a useful place to begin.

Different assets require different handling. Confirm appropriate steps with your financial institution and qualified professionals rather than assuming every asset should be titled the same way.

QR codes link directly to the destinations printed beneath them. No separate QR subscription is required.

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

A clearer path begins with understanding your situation, taking the appropriate steps, and helping your family know where to turn.

UNDERSTAND IT

Ask questions and identify what matters to your family.

GET IT DONE

Take the next step that fits your situation.

MAKE IT WORK

Organize the information, prepare the people you selected, and follow through on the details.

Love deserves a plan.

www.claim-my-legacy-estate-planning.com

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