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Legacy Dream Book

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How to Use this Legacy Dream Book

You may be thinking, “I’m trying to get my documents in order. What do my dreams and aspirations have to do with that?”

Estate planning is about **Protecting Your Wishes and Your Loved Ones!**
It starts with YOU.

What do you hope to leave behind? How do you want to be remembered? How do you want to be treated if you become unable to make your own decisions?

Yes, estate planning is about getting legally valid documents in order. But for those documents to truly enact your wishes and fit your situation, they need to be based on them.

What do you need to do? Go through this book and complete any of the sections that have meaning to you. **If a question doesn’t help you, skip it.**

There is also a set of necessary logistical questions in the back, starting with your family tree. Please fill those last 4 pages out as best as you can.

So, pour yourself a cup of coffee, tea, or other drink of choice, and use this book to help you dream about what can be for yourself and your loved ones.

PICTURE THIS...

Your loved ones are reminiscing about you, a few years after you've passed away.



You hope they remember: _____

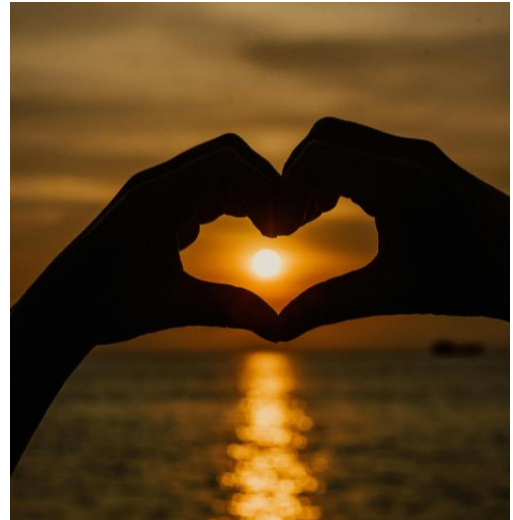
You would like to have enabled them to: _____

Your children have, with your help, reached these goals: _____

Your grandchildren have, with your help, reached these goals: _____

Other: _____

Your spouse/partner has been able to: _____



You took the burden of making these decisions ahead of time, so they don't have to:

They still have some decisions to make including: _____

Before they pass away, you hope they are able to: _____

Other: _____



Picture nearing the end of your life.

Where are you living? _____

How are you cared for? _____

What activities are you engaged in? _____

Are you actively gifting assets or money while you are alive? _____

Are you engaged in other activities to build your legacy? _____

Other: _____

It's time for your memorial.

What is the memorial/funeral/etc. like?



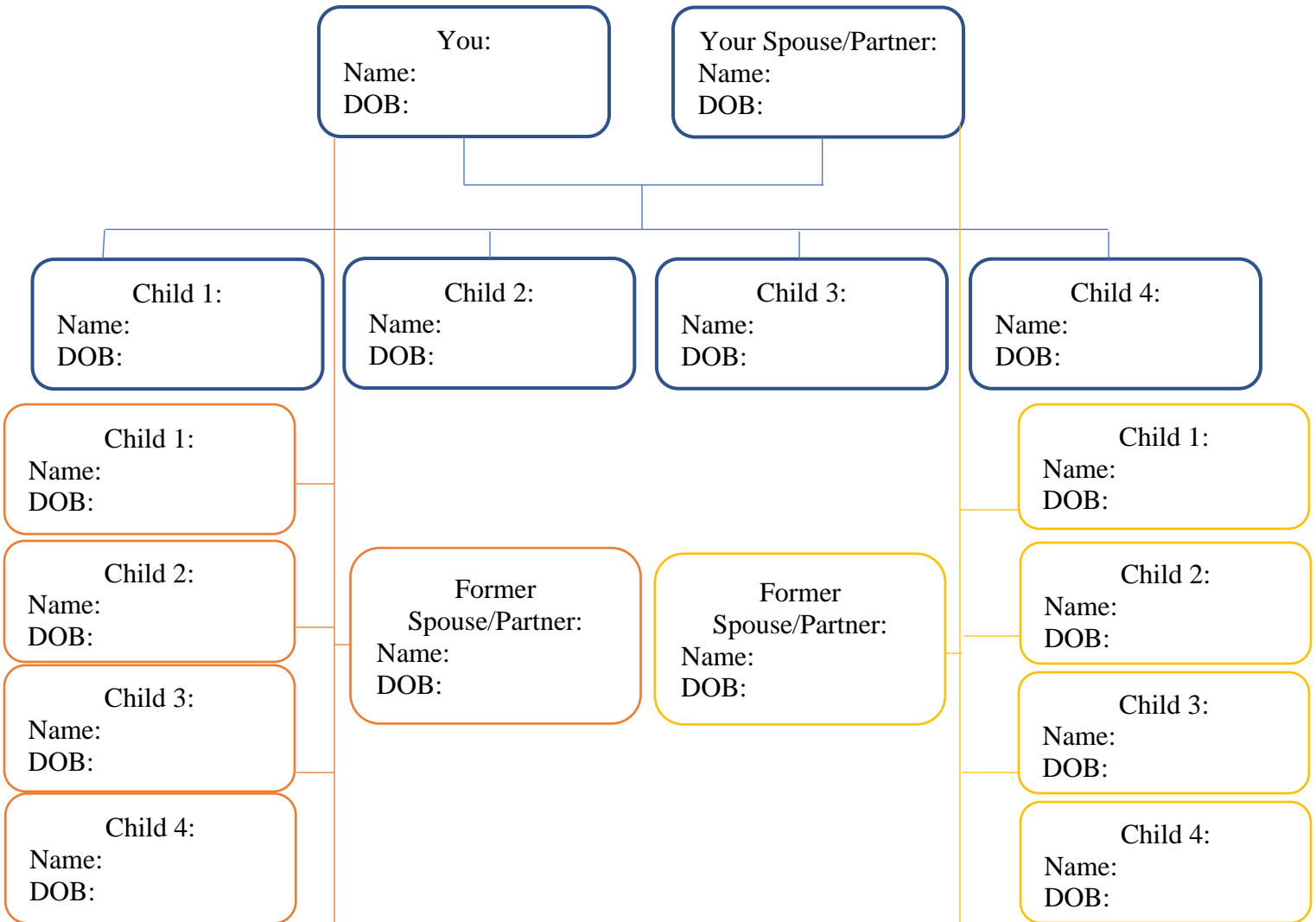
What do you want your family to remember? _____

What do you want the community to remember? _____

Do you have any specific wishes for your pets? _____

Other: _____

FAMILY TREE



Estate Distribution Considerations

- | | <u>YES</u> | <u>NO</u> |
|---|--------------------------|--------------------------|
| • Do any of your intended beneficiaries have special needs? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do any of your relatives depend on you for financial support? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do you think any of your intended beneficiaries have special problems with spouses, drugs, alcohol or handling money? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do you expect to inherit substantial assets (\$100,000 +)? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Have you ever filed a Federal Gift Tax Return? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do you have (or donated) any frozen eggs, sperm, or embryos? | <input type="checkbox"/> | <input type="checkbox"/> |

Retirement Plans

<u>Type</u>	<u>Name of Financial Institution</u>	<u>Account #</u>	<u>Name on Account</u>	<u>Approx. Value</u>

Business Interests

<u>Type</u>	<u>Name of Financial Institution</u>	<u>Account #</u>	<u>Name on Account</u>	<u>Approx. Value</u>

Life Insurance

<u>Insured</u>	<u>Owner</u>	<u>Approx. Cash Value</u>	<u>Face Value (\$ paid on death)</u>	<u>Beneficiary</u>

Other

<u>Type</u>	<u>Name of Holder</u>	<u>Account #/ Identifier</u>	<u>Owner</u>	<u>Approx. Value</u>

TRUSTED INDIVIDUALS

Original Trustee(s)

Typically, you (or you and your spouse/partner) as the original Trustee(s). Then it is only upon death that a successor trustee steps in. However, you can handle this however you prefer.

- Original Trustee(s):
- Myself alone/Both Partners/Spouses
 - One Spouse/Partner: _____
 - Immediately Appoint a Co-Trustee: _____
 - Other: _____

Successor Trustee(s)

The Successor Trustee is the person (or entity) who will manage and distribute your assets upon the death or incapacity of the original Trustee(s). A disabled individual who is eligible for government benefits should *not* be named as a successor trustee as that may disqualify them for aid.

Please provide the name and contact information of the person(s) that you want to be the decision maker concerning your estate upon your death:

Alternate Successor Trustee(s):

Minor Guardian

Please provide the name and contact information of the person(s) that you want to raise any of your children who are under 18, if both parents die:

Alternate Guardian:
