

Who Are You Planning For?

15 minutes

1. On the following worksheet, list family, friends, and charitable organizations you want to include in your legacy planning. Your next step may simply be writing a note or talking with the person or group to acknowledge their good works or importance in your life, or you may want to note how you want to reach out to them during your remaining lifetime.

Name of Person or Organization	What I Plan to Leave Them (% of estate or \$ amount)	To Do	Next Step (talk with them or with advisors)

2. Next to each name in the preceding list, using a scale of 1–5—with 5 meaning that you are in sufficient contact with them now, 1 meaning that you need to see them or talk soon—note in the margin where you are with each person.

3. Everyone usually has one person they are most concerned about. It's good to get those concerns out in the open, where they can be dealt with. Is there anyone on this list that you are concerned about especially? If so, list them and what you are concerned about. Then consider how to address that concern.

Name:

Your thoughts or concerns and actions you will take:

Name:

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4. Do you feel more resolved? Are you ready? Are your heirs? Of course not, but we can make our transitions much easier on those we love by having as much detail sketched in about our intentions as possible.

Having made this list, what do you notice and what seems now like a priority? Check () the people and organizations on these lists that you feel resolved about. Then take a careful look at your current will and trust and see if your thinking is in alignment with your current legal documents. If you find these documents daunting, ask your trusted advisor for a one- or two-page document summary in plain English. A good advisor will find this a sensible request and a good way to reopen the conversation about what you mean to accomplish.

5. What do you notice about your planning so far? If you were to die tomorrow, what seems unsettled that you would truly like to take action on right away?

Notice where you do not have a check mark above.

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