

## Planning Your Family Legacy

*Life and estate planning is not only about money and property. Personal values, lessons learned, family philosophy or family history and stories are just as important, or often even more important to people and their families. The following questions may be a helpful way to start thinking about the family legacy you would like to leave.*

What was the family you grew up in like?

What were the most important values and lessons you learned from your family?

Describe your current family?

What are the values and lessons you would like to pass on to children, loved ones, family or friends?

What's most important to you? How would you like to be thought of or remembered by your family, friends and community?

## **Your Money Roots**

Who first taught you about money?

What did you learn?

## **Your Current Thoughts About Money**

What does financial independence mean to you?

Do you have any concern about money for yourself?

Do you have any concerns or thoughts about money that you may leave for your children (or other beneficiaries)?

## **Planning a Community Legacy**

Describe any non-profit organizations you are especially committed to or would like to support.

**Circle what really interests you:**

art music children culture health education literature

athletics business elderly community religious causes

wildlife/domestic animals environment/ nature politics social issues