

Family Legacy Planner

for:

LifeDesign Legal Services™

(Place in your LifeDesign™ Portfolio behind the tab marked “Memoirs”)

Instructions

The following pages contain a variety of worksheets that will enable you to document your values and experiences for the benefit of future generations. When we think of the *value* of our estate, we often do not consider the *knowledge* we have gained during our lives as an asset. In a hundred years, your descendants may not remember how much money you left your loved ones, but you can be assured that they will know what knowledge and wisdom you have learned.

Each of the following exercises asks you to document different issues and experiences. Be sure to date each exercise.

Family Treasure Chest: This exercise asks you to identify three items of special sentimental value you would place in a treasure chest. Identify each item and then provide a short description as to why this item is important to you.

Family Heritage Tree: This exercise asks you think about your parents, grandparents or other special people in you life. In the boxes, identify a special memory or an important life lesson that you learned from each of these people. Be sure to indicate their name and their relationship to you. Finally, indicate in the bottom box what one life lesson you would hope others would learn from you.

My Three Greatest Successes in Life: As you look back on all of the successes you have experienced in your life, identify in the boxes the three greatest successes in your life that you have accomplished to date. In the columns on the right, write a brief description about how your life has changed as a result of each success.

Personal/Family Goals: Write in the three most important goals you have for yourself or your family in the next three years. Give some thought as to when you think this goal could realistically be attained and write that date in the second column. In the third column, identify in two or three words why this goal is important to you as well as what actions you need to take to achieve this goal.

Personal/Family Statement: This final exercise you may want to consult with or include other members of your family in completing. In paragraph form, write a statement that describes your mission or purpose in life. You may wish to incorporate your family's philosophies and values that identify who you are as a person or family. Keep in mind, there is no right or wrong answer to this exercise.

Family Treasure Chest

If you could put three items of sentimental value into a treasure chest what would they be?

Item #1:

Why is this important to you?



Item #2:

Why is this important to you?

Item #3:

Why is this important to you?

Today's Date: _____

Prepared by: _____

My Family Heritage Tree

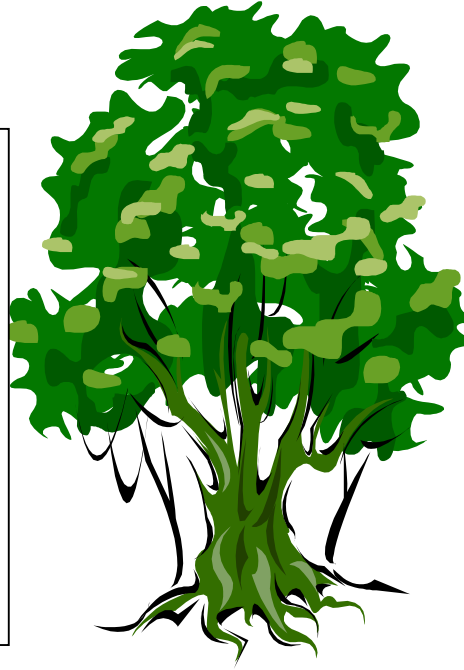
Name: _____

Relationship: _____

Name: _____

Relationship: _____

One thing I remember or learned about life from this person was...



One thing I remember or learned about life from this person was...

Me

One thing about life I would hope others would learn from me is...

Today's Date: _____

Prepared By: _____

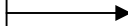
My Three Greatest Successes in Life

Success #1

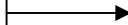


How has your life been changed as a result of this success?

Success #2



Success #3



Today's Date: _____

Prepared by: _____

The _____ Family Goals

Top Goals:

Importance to You:

Actions to Take:

Goal #1

Date to achieve goal:

Today's Date: _____

Goal #2

Date to achieve goal:

Today's Date: _____

Goal #3

Date to achieve goal:

Today's Date: _____

Personal/Family Statement

Approved and Adopted by:

Date: _____