



Designing Your Financial Legacy

Client Name _____

Date _____

Directions: The purpose of this worksheet is to assist you and your trusted advisors in designing a financial legacy that reflects what is most important to you. Please take a few minutes to reflect on each question and give thoughtful consideration to your responses.

1. In what charities or causes are you currently investing your time and energy?

2. In what charities or causes are you currently investing financially?

3. Are there other charities or causes you are considering for a one-time or ongoing investment of your time, energy, and/or money?

4. Are there charities or causes that you would like to support on an annual basis? On an perpetual basis?

5. Are there any family members for whom you would like to develop an ongoing stream of income (i.e. college fund for grown children, monthly stipend for parents or other relatives, trust for a disabled child or sibling)?

6. What charities or causes would you like to research (or have researched) to make sure contributions are utilized efficiently and responsibly?

7. Do you feel your financial legacy plan accurately reflects your values and priorities?