



YOUR LIFE IS YOUR LEGACY. It's about who you are. What you stand for. Where you came from. Your beliefs. Your wishes. Are you prepared to pass it on? Your life is inspired and shaped by special experiences, memories, people, places, and things. Would you like those things to continue to have meaning to your loved ones? Legacy planning is more about personal and practical matters—not financial ones. Planning your legacy is an emotional process, but it's also highly practical and has many immediate and future benefits.

“Putting together a plan not only helps your survivors, it's also a great chance to remind yourself of your values and priorities. These days, we're so busy that it's easy to put it off, and this process is a great opportunity to do it properly.”

— Jean Chatzky, financial editor of NBC's "Today" show, host for "Oprah & Friends" and well respected author and columnist.

IMMEDIATE BENEFITS TO YOU

PEACE OF MIND

Provides peace of mind knowing that you have taken necessary measures to protect and honor your loved ones.

PURPOSEFUL PLANNING

Establishes a foundation of knowledge that will allow you to develop a more meaningful financial and estate plan that is reflective of who you are and what you desire.

PRIORITIZATION

Inspires you to establish and act upon a new set of priorities in your life.

ALIGNMENT

Helps you determine whether or not your most valuable resources (time, talent and money) are properly aligned with your needs, wants and wishes.

GRATITUDE

Legacy planning reminds you of all the things you are grateful for in your life. This feeling of gratitude will inspire you to live a better life.

FUTURE BENEFITS TO LOVED ONES

POSITIVE INFLUENCE

Documenting and passing on words of wisdom and guidance about the upbringing of you your children and/or grandchildren can have a profound impact on their lives.

PRESERVATION OF HERITAGE

Make sure your family traditions and values continue to be preserved for generations. This information is too valuable to risk being lost.

GRIEF RECOVERY

Advanced preparation provides your loved ones with the opportunity to grieve and rebuild their lives rather than be burdened by the troubles that often arise in the aftermath of death.

REDUCED ANXIETY

Ensures practical instructions about pet care and household maintenance are known.

FAMILY HARMONY

Prevents family disputes by making your wishes known—so you leave a legacy of memories, not problems.