Retirement Income Architecture™

Legacy Planning Worksheet

What Do You Want Your Wealth to Accomplish?

Estate planning is about **who receives your wealth.**

Legacy planning is about **what you want your wealth to accomplish**—during your lifetime and for the people and causes that matter most after you're gone.

There are no right or wrong answers.

This worksheet is simply designed to help you reflect on what matters most before making financial and estate planning decisions.

Part One

What Does Financial Success Mean to You?

Take a few moments to reflect.

1. When you look back on your life, what are you most proud of?

____

____

2. What values have guided your financial decisions?

☐ Responsibility
☐ Independence
☐ Education
☐ Faith
☐ Family
☐ Generosity
☐ Hard Work
☐ Entrepreneurship
☐ Other __________________________

3. What lessons about money do you hope future generations remember?

____

____

____

Part Two

What Do You Want Your Wealth To Do?

Complete the sentence.

“I hope my wealth will…”

- ☐ Help family members become financially independent.
- ☐ Create educational opportunities.
- ☐ Provide security during difficult times.
- ☐ Encourage entrepreneurship.
- ☐ Support charitable causes.
- ☐ Preserve family assets.
- ☐ Strengthen future generations.
- ☐ Other:

Why is this important to you?

Part Three

Who Do You Hope To Impact?

Who has been most important in your life?

Besides immediate family, are there people whose lives you would like your wealth to improve?

Are there charitable organizations or community causes that have shaped your life?

Part Four

During Your Lifetime or After?

Some people prefer to see the impact of their giving.

Others prefer their legacy to continue after they're gone.

Many choose both.

Which best describes you?

☐ I would rather help people while I'm living.
☐ I prefer most gifts to occur after my lifetime.
☐ I would like a combination of both.

Why?

Part Five

Beyond Money

Legacy isn't always measured in dollars.

What else would you like your family to remember about you?

If your grandchildren described you twenty years from now, what would you hope they would say?

Part Six

One Final Question

Imagine your family gathering together twenty years from now.

Someone says,

"Your parents (or grandparents) planned well."

What do you hope they mean?

Reflection

The purpose of this worksheet is not to create legal documents.

It is to help you begin thinking differently about your wealth.

Once you're clear about **what you want your wealth to accomplish**, decisions about estate planning, charitable giving, family conversations, and financial planning often become much clearer.

Remember

An estate plan answers:

Who receives my wealth?

A legacy plan answers:

What do I want my wealth to accomplish during my lifetime—and for the people and causes that matter most after I'm gone?

Retirement Income Architecture™

Retirement isn't simply about preserving wealth.

It's about preparing the people your wealth will one day serve.

— John Lau, CPA, CFP®, MST

Disclosures