

# Legacy Planning Workbook



**CARSON**  
COACHING

# Legacy Will Workbook

Your legacy includes much more than assets and possessions; your legacy is the impact you make on those who outlive you. Thinking about your legacy gives you the opportunity to intentionally decide how you will leave your mark on your loved ones and the world as a whole. A Legacy Will goes beyond the traditional Last Will & Testament to include all of the important things you want to instill and pass down to future generations. It can include things like family recipes, generational stories, family values, philosophies, important causes and charities, favorite quotes, wisdom, advice, and more.

Use this workbook to guide your thinking in creating a Legacy Will and/or preparing for a Family Summit Meeting. Find a quiet space and take some time to reflect on each question.



# Legacy Will Workbook (cont.)

**Name:**

**Date:**

- 1. What are the principles that guide your family's life/choices/decisions?

## Legacy Will Workbook (cont.)

- 2. What values are you instilling and passing on to your family, or what values do you WANT to instill and pass on to your family?**

# Legacy Will Workbook (cont.)

**3. What lessons have you learned in life that you want to pass on to future generations?**

# Legacy Will Workbook (cont.)

- 4. What are some of your favorite quotes, bible verses, proverbs, or other pieces of wisdom?**

## Legacy Will Workbook (cont.)

- 5. What are the things – traditions, skills, passions, values, character traits – that you want to intentionally teach your children and grandchildren?**

# Legacy Will Workbook (cont.)

**6. What advice would you give to a young person growing up today?**



# Legacy Will Workbook (cont.)

- 7. How do you want your wealth to impact your family members and the causes you love and support?**

# Legacy Will Workbook (cont.)

**8. What family recipes do you want to make sure to leave to your children and grandchildren?**

# Legacy Will Workbook (cont.)

**9. What family photos do you want to make sure to leave to your children and grandchildren?**



# Legacy Will Workbook (cont.)

**10. What family stories do you want to make sure to leave to your children and grandchildren?**

## Legacy Will Workbook (cont.)

- 11. Are there any other important ideas or messages you want to share with your children, grandchildren, and other future generations?**