

Identifying & Distributing Your Wealth

We believe that wealth lies in more than your money and real estate. Legacy planning involves identifying the wealth that you have made or gathered and deciding how best to transfer these priceless assets to your loved ones.

Identify 6 objects of priceless value and wealth to you and/or your family	What makes each object meaningful to you?	Who do you want to receive each object?	What do you want that person to know about each object?	What do you want that person to do with each object?	What steps should you take to make sure this gift happens?