



MYESTATEJOURNEY.COM



MY ESTATE
JOURNEY

My Estate Values & Priorities

A guided reflection to help you understand
what matters most to you – the foundation of your estate plan.



MY ESTATE
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Let's Begin



Welcome

Planning your estate begins long before you make legal decisions. It starts with clarity — clarity about who you are, what you value, and what you want to protect.

This workbook is designed to help you reflect on the **personal foundations** of your estate plan. By exploring your **values, priorities, and strengths**, you'll create a clear sense of direction that will guide every decision you make.

How to Use this Workbook

You should move through the sections at **your own pace**.

There are no right or wrong answers — only what **feels true** for you.

Write freely and honestly in the reflection spaces. **Writing** helps your thoughts slow down and take shape. What you put into words becomes clearer, steadier, and easier to trust. Let your reflections land on the page—they will guide you well.

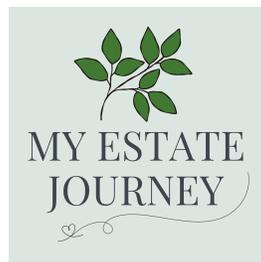
Your reflections will help you create an estate plan that feels **aligned, intentional,** and deeply **personal**.

As your life evolves,
you should **revisit &**
update your reflections.





Estate planning begins with clarity —
clarity about who you are, what you
value, and what you want to protect.





1. Inner Values

What guides your decisions and relationships

Values in Action

How Your Values Show Up

Reflect on how your values influence your life today.

Which value do I express most naturally?

Which value do I want to express more intentionally?

Which value feels especially important as I think about the future?



2. LIFE PRIORITIES

What matters most in your life right now.

People & Relationships

The People Who Matter Most

Reflect upon those people who matter most in your life today.

Who are the people I feel responsible for or deeply connected to?

Who relies on me emotionally, financially, or practically?

Who would I want to support or protect through my estate plan?

Responsibilities & Commitments

Your Current Responsibilities

Reflect upon your current responsibilities and commitments in your life today.

What responsibilities do I carry?

Which responsibilities feel most important to prepare for?

Where do I want more clarity or organization?

Goals & Dreams

Your Long-Term Vision

Reflect upon your long term vision.

What are my long-term goals for my life, family, or future?

What dreams or intentions do I want to protect or make possible?

What would “living in alignment” look like for me?

*Your estate plan should support the life
you want to build.*



3. PERSONAL STRENGTHS

The qualities you can lean on as you plan.

VIA CHARACTER STRENGTHS

Framework Overview

The VIA Institute on Character

The science of strengths. The practice of well-being.

Based in Cincinnati, Ohio, the **VIA Institute on Character** is a non-profit organization dedicated to bringing the science of character strengths to the world.

In the early 2000s Scientists discovered a common language of **24 character strengths** that make up what's best about our personality.

We all have a distinct constellation of strengths

Character strengths are different than your other personal strengths, such as your unique skills, talents, interests and resources, because they reflect the "real" you—who you are at your core. Every individual possesses all 24 character strengths in different degrees, giving each person a **unique character** strengths profile. These strengths influence your behavior and help guide how you relate to the world around you in a naturally empowering way.

Understanding your character strengths can help you make more intentional decisions, build stronger relationships, and approach challenges with greater confidence.

VIA STRENGTHS:

Wisdom | Knowledge | Courage

**WISDOM & KNOWLEDGE
STRENGTHS** are:

Creativity
Curiosity
Judgment
Love of Learning
Perspective

COURAGE STRENGTHS are:

Bravery
Honesty
Perseverance
Zest

Reflection:

How do these strengths help me make thoughtful decisions?

VIA STRENGTHS:

Humanity | Justice

HUMANITY STRENGTHS are:

Love
Kindness
Social Intelligence

JUSTICE STRENGTHS are:

Teamwork
Fairness
Leadership

Reflection:

How do these strengths shape the way I care for others or think about their future?

VIA STRENGTHS:

Temperance | Transcendence

TEMPERANCE STRENGTHS are:

Forgiveness
Humility
Prudence
Self-Regulation

TRANSCENDENCE STRENGTHS are:

Appreciation of Beauty
Gratitude
Hope
Humour
Spirituality

Reflection:

How do these strengths influence the legacy I want to leave?

PERSONAL STRENGTHS

My Strengths to Lean On

Reflect on your strengths and how you can apply them in your estate planning.

Strengths I use naturally are:

Strengths I want to use more intentionally are:

Strengths that will support my estate planning are:

Research has shown that knowing your strengths and using them more often leads to greater well-being, better performance, and more resilience.



4. FUTURE INTENTIONS

What you want to shape, protect, or pass on.

YOUR WISHES

My Wishes

Reflect upon your wishes.

What do I want to ensure happens if I'm unable to make decisions?

What matters most to me in my medical or personal care?

What do I want my loved ones to know about my wishes?

Your estate plan should clearly outline your wishes for today and the future.

YOUR LOVED ONES

The People I Want to Support

Reflect upon the people you want to support now and in the future.

What kind of support do I want to leave for the people I care about?

What guidance would help them feel confident and prepared?

What would bring them peace of mind?

Your estate plan should have clear instructions and guidance for your loved ones.

YOUR LEGACY

My Legacy

Reflect upon the legacy you want to leave.

What values do I want to pass on?

What impact do I hope my decisions will have on others?

What do I want people to remember about how I lived and cared?

Your estate plan helps you build the legacy you desire.

VALUES, PRIORITIES, STRENGTHS SUMMARY

My Estate Foundation

Summarize your **Estate Foundation** in the sections below:

My top 5 **VALUES** are:

- 1.
- 2.
- 3.
- 4.
- 5.

My **CURRENT PRIORITIES** are:

-
-
-
-
-

My **PERSONAL STRENGTHS** are:

-
-
-
-
-

My **Estate Plan** should **SUPPORT**:

-
-
-
-
-

VALUES, PRIORITIES, STRENGTHS SUMMARY

My Estate Foundation

Summarize your Estate Foundation in 1-2 sentences:

My Estate Plan should reflect....

