FAMILY LEGACY PLANNING GUIDE

Organize what matters. Share what matters. Protect what matters.

A Family Legacy Is More Than Possessions

A family legacy includes the practical information people may need in an emergency, but it also includes your values, stories, wishes, responsibilities, relationships, and the lessons you hope will continue into future generations.

This guide gives you one place to begin important conversations and record where essential information can be found. You do not need to complete everything at once. Start with what is most important, involve the appropriate family members, and review the guide regularly.

Important: For security, avoid writing passwords, full account numbers, Social Security numbers, or other highly sensitive credentials in a copy that may be widely accessible. Record where securely stored information can be found instead.

YOUR LEGACY AT A GLANCE

My full name	____
Date completed / updated	____
Primary person I want informed	____
Where important documents are stored	____
Attorney / trusted professional	____
Other person who should know this guide exists	____

1. FAMILY & EMERGENCY CONTACTS

Identify the people who should be contacted and the roles they may need to play.

Immediate family / next of kin: ____

Primary emergency contact: ____

Secondary emergency contact: ____

Attorney or legal adviser: ____

Financial / insurance contact: ____

Faith or community contact: ____

Other important person: ____

2. IMPORTANT DOCUMENTS

Do not necessarily place originals in this guide. Record where current documents are securely stored.

Will / estate documents: ____

Trust documents, if applicable: ____

Power of attorney documents: ____

Healthcare directives / living will: ____

Birth / marriage / citizenship records: _____________________________________

Property deeds / titles: ____

Insurance policies: ____

Other important documents: ____

3. HEALTH & CARE INFORMATION

Record where family members can find the information needed to support appropriate care.

Primary healthcare professional: ____

Preferred hospital / healthcare system: ____________________________________

Medication list stored at: ____

Allergy / medical information stored at: ____________________________________

Healthcare proxy / decision-maker: ____

Care preferences I want discussed with my family: ___________________________

4. FINANCIAL & HOUSEHOLD INFORMATION

Create a map of where important information is held without exposing sensitive account credentials.

Banking information can be located at: _____________________________________

Insurance information can be located at: ___________________________________

Mortgage / rent / property records: ____

Recurring household bills and services: ____________________________________

Tax / accounting records: ____

Business interests or responsibilities: ____________________________________

Person who can help locate financial records: _______________________________

5. DIGITAL LIFE & ONLINE ACCOUNTS

Digital assets may include email, photographs, cloud storage, subscriptions, social media, websites, business accounts, and other online property. Keep credentials in a secure password manager or other protected system.

My password manager / secure credential system is: ________________________________

Instructions for accessing it are securely held by / at: _____________________________

Important digital photographs or family archives are stored at: ______________________

Websites / online businesses requiring attention: ___________________________________

Social media wishes or instructions: ____

6. HOME, PROPERTY & MEANINGFUL POSSESSIONS

Some possessions have financial value; others carry family history. Identifying both can prevent confusion later.

Property requiring attention: ____

Vehicles / titles: ____

Jewelry, artwork, heirlooms, collections or meaningful objects: _____________________

Items with a family story I want preserved: ____

People I would like to receive particular meaningful items: _________________________

7. CARE, FUNERAL & FINAL-WISH CONVERSATIONS

These conversations can be difficult, but documenting preferences can reduce uncertainty for the people you love. Formal requirements vary by location, so appropriate professional guidance may be necessary.

Person I want involved in these decisions: ____

Burial / cremation / other preference, if known: _____________________________________

Preferred location or family connection: ____

Faith, cultural or family traditions important to me: __________________________________

People / organizations I would want informed: ______________________________________

Other wishes I want my family to understand: _______________________________________

8. FAMILY STORIES, VALUES & HERITAGE

A legacy is also the story of who you are and what your family has learned.

Where our family comes from: ____

A story future generations should know: ____

A family tradition I hope continues: ____

The values I most want to pass forward: ____

A lesson life taught me that I want remembered: ____________________________________

9. LETTER TO THE NEXT GENERATION

Use this space to begin a message to your children, grandchildren, family, or those who will carry your legacy forward.

10. FAMILY CONVERSATION PLAN

Documents are valuable, but conversation is what turns information into understanding. Choose a calm time to explain what you have organized and where it can be found.

Who should be part of the conversation?	____
When will we have it?	____
What are the three most important things to discuss?	____
Who needs a copy or secure access?	____
When will we review this plan again?	____

LEGACY ACTION CHECKLIST

■ I have identified the people my family should contact.

■ I know where my key legal and personal documents are stored.

■ My healthcare and care-preference information is current.

■ My family knows where important financial and household information can be located.

■ I have a secure plan for digital accounts and digital assets.

■ I have identified meaningful possessions and family stories worth preserving.

■ I have considered the final-wish conversations my family may need.

■ I have recorded values, stories, traditions, or lessons I want passed forward.

■ At least one trusted person knows this guide exists and where it is kept.

■ I have chosen a date to review and update this information.

A LEGACY IS BUILT WHILE WE ARE LIVING

Planning is not about expecting the worst. It is an act of stewardship: reducing uncertainty, protecting the people we love, preserving family knowledge, and making sure the things that matter are not left unsaid.

Building Healthier Lives, Stronger Families, and Lasting Legacies.

This guide is an educational organizational resource and does not provide legal, tax, financial, insurance, medical, or estate-planning advice. Laws and requirements vary. Consult appropriately qualified professionals for advice specific to your circumstances.