

# Simple Steps To Planning Your Legacy And Ensuring Your Family Future

Planning your legacy is an important part of ensuring your family's future. It's not just about making sure your assets are distributed according to your wishes, but also about communicating your values and goals to your loved ones.

Here are some simple steps to get you started:

1. **Start by writing a will.** A will is a legal document that outlines your wishes for how your assets will be distributed after you die. It's important to have a will in place, even if you don't have a lot of assets, because it can help to avoid probate and ensure that your wishes are carried out.
2. **Consider creating a trust.** A trust is a legal entity that can be used to manage your assets during your life and after your death. Trusts can be used to avoid probate, protect your assets from creditors, and provide for your loved ones in the way you want.
3. **Talk to your family about your wishes.** It's important to talk to your family about your wishes for your legacy, so that they are aware of your intentions and can help to carry them out. This conversation can be difficult, but it's important to have it.
4. **Make sure your finances are in order.** This means having a budget, saving for retirement, and making sure you have adequate insurance. By taking care of your finances, you can help to ensure that your family will be financially secure after you're gone.

5. **Plan for your healthcare.** This means making decisions about your medical care, including who will make decisions for you if you become incapacitated. By planning for your healthcare, you can help to ensure that your wishes are respected and that you receive the care you want.
6. **Write a letter to your loved ones.** This letter can be used to express your love and appreciation for your family, as well as to share your values and goals. This letter can be a valuable gift to your loved ones, and it can help them to remember you after you're gone.

Planning your legacy is not a one-time event. It's an ongoing process that you should review and update regularly. As your life changes, so too should your legacy plan. By taking the time to plan your legacy, you can help to ensure that your family's future is secure and that your values and goals are carried out.



## The Legacy Plan: 5 Simple Steps To Planning Your Legacy And Ensuring Your Family's Future

by Mary Kay Andrews

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Here are some additional tips for planning your legacy:

- **Start early.** The sooner you start planning your legacy, the more time you'll have to make thoughtful decisions and to communicate your wishes to your loved ones.
- **Get professional help.** If you need help with estate planning or with creating a trust, be sure to consult with a qualified professional.
- **Be flexible.** Your legacy plan should be flexible enough to accommodate changes in your life and in your family's circumstances.
- **Communicate your wishes.** It's important to communicate your wishes to your family and to your trusted advisors. This will help to ensure that your wishes are carried out.
- **Review your plan regularly.** Your legacy plan should be reviewed and updated regularly to make sure that it still reflects your wishes and your family's needs.

By following these simple steps, you can help to ensure that your legacy is one that you'll be proud of.



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