



## Beyond the Will: Protecting Your Legacy, Empowering Your Family

*A candid look at estate planning, strengthening the next generation, and passing on more than just money.*

### What We'll Cover Today

- The 4 Levels of Legacy Preparedness
- Why estate planning is about more than just documents
- Common reasons wealth doesn't last beyond one generation
- Early life influences on financial habits
- Why many heirs plan to change financial advisors
- 6 practical takeaways to protect your legacy and empower your family

### The 4 Levels of Preparedness

- Level 0 – No plan at all; hoping for the best
- Level 1 – A basic plan that hasn't been updated
- Level 2 – An active plan that's regularly reviewed
- Level 3 – A fully optimized strategy for taxes, clarity, and long-term legacy impact

### 6 Ways to Strengthen Your Legacy

1. Document your wishes in writing — at minimum, put something in place
2. Simplify and optimize your financial accounts and tax exposure
3. Write a family letter — outline the what, why, and who
4. Hold a family meeting — increase clarity and reduce future stress
5. Share your values — through letters, videos, or stories
6. Educate your heirs — help them build financial confidence and stewardship

### Final Thoughts

Legacy isn't about net worth — it's about intentionality. By taking steps today, you provide clarity, peace, and direction for those you love.

**Whether you're just getting started or already have a plan,  
your next steps can make a lasting difference.**

### Stay Connected. Here to Serve:






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