

PLAN YOUR LEGACY

Show me the benefits

Breaking the Ice

1. Why does planning matter to you?

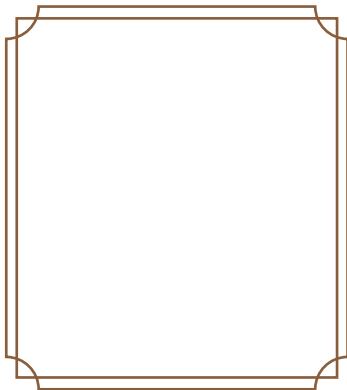
Attach additional sheets or pages as required

2. What are the benefits to you?

3. What does legacy planning mean for you?

4. Who would you like to benefit?

Role Models / Success Stories



PUBLIC OR PRIVATE EXAMPLES

Who do you know that has (or had) a long term plan?

What have they achieved? (Attach additional pages as required)

How To (Short vs. Long Term Thinking)

BORN

Where are you in your planning?

DIE



External & Internal Environment



**ANGELINA CARLETON
LEGACY PLANNING**

Wealth From Knowledge