

ESTATE PLANNING WORKBOOK

HOW TO GIVE THE
BEST GIFT

YOU CAN GIVE YOUR FAMILY



wills & wellness® estate planning

Foundation. Family. Future.

3 WAYS TO GET MASSIVE VALUE

FROM THIS WORKBOOK

01

Print this workbook and use it during our educational webinar to stay fully engaged and take notes on the actions you want to implement quickly.

02

Think of ONE question you want answered while we are live together. If I don't answer your question during the webinar, you can ask it during the Q&A.

03

Think about the people in your life who you trust most. During the webinar, imagine them in the roles presented and imagine what they would want to know.

THE 3 BIGGEST REAL FEARS

ABOUT ESTATE PLANNING

01

Planning for "it" will

_____.

02

It will _____ too long and
you don't have _____.

03

I'm not _____.

IDEAS, INSIGHTS AND ACTION ITEMS

THE BIG PICTURE

Estate planning isn't about _____ – it's about the people you _____.

They'll know whether you lived up to your promise " _____ "

IDEAS, INSIGHTS AND ACTION ITEMS



LIFE EVENT NO. 01

LIFE INSURANCE TO A MINOR

01

_____ court is
required.

02

_____ and
_____ trump a will.

03

A _____ is a will
substitute.

IDEAS, INSIGHTS AND ACTION ITEMS

LIFE EVENT NO. 02

EMERGENCY SITUATION

01

_____ guardianship is just as important as who raises your kids.

02

Only _____ are the default temporary guardians.

03

Your plan _____ unless you share it with others.

IDEAS, INSIGHTS AND ACTION ITEMS



LIFE EVENT NO. 03

ADULT IS INCAPACITATED

01

The doctors can talk to _____ about your condition.

02

Medical decisions are made by _____ by default.

03

It doesn't make a difference if _____.

IDEAS, INSIGHTS AND ACTION ITEMS

LIFE EVENT NO. 04

A PARENT PASSES AWAY

01

When to _____ is decided as a group.

02

A _____ has the final say-so of who is guardian of your kids.

03

_____ real estate means _____ probate .

IDEAS, INSIGHTS AND ACTION ITEMS



LIFE EVENT NO. 05

YOUNG ADULTS INHERIT

01

_____ comes before the kids.

02

_____ means heirs have complete control over the money.

03

You can build in a _____
_____ to help your heirs.

IDEAS, INSIGHTS AND ACTION ITEMS

BONUS LESSON

WHAT MATTERS MOST

01

Your _____

02

Your _____

03

Your _____

04

Your _____

IDEAS, INSIGHTS AND ACTION ITEMS

HOW TO TAKE ACTION

(BEFORE IT'S TOO LATE)



Your Design Meeting to discuss the Wills & Wellness Plan or Platinum Package is _____ when held within 21 days from today. This is a working meeting where you'll know exactly what your estate plan would look like and the _____. You get to decide at this meeting YES, NO, or NOT YET. A _____ is made at this meeting when you move forward.

IDEAS, INSIGHTS AND ACTION ITEMS



If you want to do the Group Workshop, your Design Meeting is pre-scheduled for the first Friday of the month at 2pm.