Legacy Ready Family Checklist

Prepare the people, information, and conversations that support transfer.

Pillar: Transfer

A Transfer resource for legacy wishes, family communication, estate-planning education, digital assets, and next-generation preparation.

Action Checklist

- [ ] 1. Name what you want your legacy to support.
- [ ] 2. Confirm where key documents are stored.
- [ ] 3. Start one family money conversation.
- [ ] 4. List digital assets and access instructions.

Notes

Next Steps

Take the Legacy Ready Assessment. Explore Resources. Explore Financial Bliss Academy. Bring Legacy Ready to Your Organization.

Disclaimer

This resource is provided for general educational and informational purposes only. It does not constitute individualized financial, investment, insurance, tax, estate-planning, or legal advice. Financial and legal circumstances vary. Consult appropriately qualified professionals regarding decisions specific to your circumstances.

This resource does not determine which estate-planning documents may be legally required or appropriate for any individual.