Legacy Ready Starter Guide

A practical first step for turning financial awareness into action.

Pillar: Legacy Ready

Use this guide to understand the Legacy Ready framework and identify the next financial conversation or task that deserves your attention.

Action Checklist

- ☐ 1. Map your current financial priorities.
- ☐ 2. Name the people affected by your financial decisions.
- ☐ 3. Choose one action in each pillar.
- ☐ 4. Set a review date for the next 30 days.

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.