

# THE LEGACY SPECTRUM



## Invitation To Family Meetings

*Use this letter as a template for one you will write to introduce your children to the concept of family meetings. Just as each family is unique, so too is each invitation. Yours should reflect your goals and your family.*

MM/DD/YY

Dear Children,

Your (*mother/father*) and I have spent a good deal of time updating our estate and legacy plans. You are an essential part of our legacy and an essential part of the next phase of our planning.

In this phase, we intend to gather, once each year, as a family for two to three hours to discuss aspects of the legacy we wish to leave. We will chose a meeting time and place that is convenient for all of us.

Our goals in holding family meetings are:

1. Develop trusting relationships that can serve as a foundation from which to make difficult family decisions.
2. Pass on our values to you through sharing family stories and our experiences.
3. Discuss the goals we want our estate plan to accomplish
4. Help prepare you to handle a significant financial inheritance.

While there are some logistics to work out, your (*mother/father*) and I are excited to spend time with you and share this important part of our lives. We will call you in the next few days to answer your questions. In the meantime, think about some dates and times for our first meeting that would work well for you.

Love,

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(*Mom / Dad*)