

THE LEGACY SPECTRUM



Why We Choose To Leave Money To Our Children

Most estate planning presupposes that parents want to leave assets to their children upon their deaths. Leaving assets, however, is a choice. Under the law, you may leave your assets to any individual, institution or entity you choose. If you do not have living children, or choose not to leave them assets upon your death(s), please so indicate below. If you have living children (and/or grandchildren), however, and you intend to leave a portion of your estate to them, please articulate the three or four specific reasons you have chosen to do so. If you are married, it is important to complete this worksheet together.

Today's Date: _____

_____ We do not have living children or do not want our assets to pass to them.

_____ We want to leave a portion of our wealth to our children for the following reasons. In order of priority those reasons include:

1. _____

2. _____

3. _____

4. _____

5. _____

Note: This form has no legal binding effect. Your advisors may use it to trigger thought, discussion and dialogue as they work to create a Legacy Plan for you.