RAYMOND JAMES

A living legacy checklist

Every day you're writing your legacy – is it one that reflects what matters most to you? Review this checklist for ideas on how to communicate your values through your actions at home, in the workplace and in the community.

YOUR FAMILY LEGACY

- ☐ **Make time for more.** Deliberately set aside time for togetherness through events like a weekly movie night or even an annual trip.
- ☐ **Cover your legal bases.** Establish or update your will, durable power of attorney, healthcare proxy and advance directive.
- ☐ **Schedule a family meeting.** Talk about "big" things, like your values and plans for your estate, as well as simpler things.
- ☐ **Consider the unexpected.** Periodically review your insurance coverage to ensure your loved ones are properly protected.
- ☐ **Give your legacy a voice.** Put important information and treasured memories in your own words by writing an ethical will or family love letter.
- ☐ **Create sacred space.** Consider setting "no-phone zones" – at the dinner table, for example – to allow time to be fully present with loved ones.
- ☐ **Adjust as life shifts.** Family changes often affect your finances, so discuss any marriages, births, deaths, divorces or sudden windfalls with your advisor.

LIVE YOUR LEGACY YOUR WAY.

Get guidance that can help you create a lasting impact.