

Legacy Planning Worksheet

Legacy planning captures the non-financial parts of life that matter most, your values, wishes, stories, and the guidance you want others to have. It preserves the memories and meanings you want to leave behind, not just the logistics. Use this worksheet to reflect on and document the values, memories, and guidance that define the legacy you want to pass on.

1. Personal Values and What Matters Most

Use this section to reflect on the values you want to guide decisions now and in the future.

1. What values are most important for others to understand about you?
2. What brings you a sense of purpose or meaning?
3. What do you hope people remember about you?

2. Messages for Loved Ones

This is a space for words you want shared, now or later.

1. People you would like to leave a message for
2. What you would like them to know
3. Are there messages you want shared at a specific time or milestone?

3. Life Stories and Memories

Capturing stories preserves more than facts. It preserves context.

1. Moments or experiences that shaped who you are
2. Traditions, rituals, or memories you want continued
3. Lessons you learned the hard way but are happy to pass along

4. Wishes for Care and Decision Making

This section supports informed, values-based decisions if others need to speak on your behalf.

1. What quality of life means to you
2. Things you would want prioritized if decisions needed to be made
3. Things you would want avoided

5. Legacy Beyond Finances

Legacy is not just assets. It is influence.

1. Causes, communities, or organizations that matter to you
2. Ways you would like to make an impact, big or small
3. Skills, knowledge, or values you hope are passed on

6. Digital and Personal Presence

Because your digital life exists whether we plan for it or not.

1. Online accounts or digital content you want handled intentionally
2. Photos, documents, or creative work you want preserved or shared
3. Any digital memories you want highlighted

7. Guidance for the People You Trust

This helps reduce uncertainty for those stepping into support roles.

1. Who should help carry out your wishes
2. What guidance would make things easier for them
3. Anything you want them to know about how to work together

8. Review and Revisit

Legacy planning evolves.

1. Date this worksheet was completed
2. When you would like to review or update it
3. Where this worksheet is stored and who knows it exists

*This worksheet is meant to support conversations and clarity.
It does not replace legal or financial planning documents, but it makes them far more human.*