Legacy Investor Toolkit — Welcome Guide

Welcome!
Thank you for downloading the *Legacy Investor Toolkit*. This resource was designed to help you simplify investing, track your progress, and build lasting wealth.

Inside your toolkit, you'll find:

■ ETF Screening Checklist

■ Crypto Tax Tracker

■ Legacy Wealth Planning Template

■ Affiliate Resource List

Quick Links:

ETF Checklist

Crypto Tax Tracker

Wealth Planning Template

Affiliate Resource List

Stay Connected
For updates, new tools, and exclusive investing resources, contact me at: legacyinvestor@email.com

This toolkit is for your personal use only. If you'd like to share it, please share the signup link instead — so everyone receives the latest version.

How to Use This Toolkit

1. **Start with the ETF Checklist** → screen funds that fit your goals.

2. **Use the Crypto Tax Tracker** → log taxable events and simplify filing.

3. **Plan with the Legacy Wealth Template** → clarify goals, risk, and long-term strategy.

4. **Explore the Resource List** → discover tools that support wealth building.

5. **Stay Connected** → updates, new tools, and exclusive content via your email.

■ *Tip: Save copies of the worksheets to your own Google Drive for ongoing use.*