

The Protect Your Legacy Checklist

A Private & Simple Worksheet to Organize Your Final Wishes and Ensure Your Family is Protected.

Thinking about these things is a profound act of love. This worksheet is for your eyes only, designed to bring you clarity and peace of mind. You don't need exact numbers—just thinking through the categories is a powerful first step.

Funeral & Memorial Wishes

What is important for you to have covered?

- ☐ Casket or Urn
- ☐ Funeral Home Service Fees
- ☐ Burial Plot or Niche
- ☐ Headstone or Grave Marker
- ☐ Flowers & Decorations
- ☐ Service Programs or Obituaries
- ☐ Reception or Repast for Loved Ones

Outstanding Financial Responsibilities

What potential debts would you want to ensure are not a burden to your family?

- ☐ Final Medical Bills
- ☐ Mortgage Balance
- ☐ Car Loan
- ☐ Credit Card Debt
- ☐ Other Personal Loans

Leaving a Final Gift (Legacy)

A plan can also provide a final gift, free of any debts.

- ☐ A small nest egg for a spouse
- ☐ A gift for children or grandchildren
- ☐ A donation to a favorite church or charity
- ☐ Funds to cover legal or administrative fees

You've Taken the First Step. What's Next?

Seeing these items listed out can feel like a lot, but the goal is clarity, not worry. A dedicated Final Expense plan is a simple and affordable life insurance policy designed specifically to provide the funds for these exact needs.

The next step is a simple, no-obligation conversation to see what a plan could look like for you. I can help you find a plan that fits your budget and secures your family's future.