

Green Estate Planning

A Simple Guide to
Protecting Your Family
and our Planet

Because your legacy is more than what you leave behind — it's the world you help create.



Small Planet Law LLC



Small Planet Law LLC



HI, I'M BOBBIE

PERSONAL FAMILY LAWYER

Thanks for taking a moment to read this guide. My goal is to give you a clear, simple overview of estate planning — and to show how the process can reflect not only your love for your family, but also your care for the planet and your community.

Most people aren't looking for legal jargon or pressure. They want honest guidance, straightforward information, and a plan that aligns with their values. That's what you'll find here: a practical, accessible guide to building a plan that protects your loved ones and supports the future you hope to help create.

Let's explore together!

Welcome to Your Green Estate Planning Guide

This short guide is designed to give you a clear, approachable overview of estate planning — and to show how the process can reflect not only your love for your family, but also for the Earth and our shared future. My goal is to make everything simple, grounded, and aligned with your values.

Below, you'll find the main sections of this report so you can easily navigate to what matters most to you.

What's Inside

1. What Is Estate Planning, Really?

A simple, accessible explanation of what estate planning is and why it matters.

2. What are the Essential Pieces of a Good Estate Plan?

A clear overview of the core components every family needs — with sustainable options woven throughout.

3. What Makes Estate Planning “Green”?

Practical ways to align your plan with your environmental and community values.

4. Why Work with a Personal Family Lawyer® for Green Estate Planning?

How a relationship-based approach supports your family and your vision for the future.

5. How do I get started on my own Green Estate Plan?

A warm invitation to begin creating a plan that protects your loved ones and reflects your values.

Green Estate Planning Guide

Why I Do This Work

I've spent my career at the intersection of law, community wellbeing, and care for the more-than-human world.

For over 15 years, I've worked in environmental law and climate advocacy — partnering with communities, scientists, and organizers to protect health, safety, and the ecosystems we all depend on — work I continue alongside my estate planning practice. That experience has shaped my understanding of responsibility, stewardship, and what it means to plan for a future that extends beyond ourselves.



Estate planning may seem like a different path, but to me, it's deeply connected. It's another way of tending to what we love — our families, our communities, and the living world that sustains us. As a Personal Family Lawyer®, rigorously trained and certified in estate planning, I help clients navigate their choices with clarity and confidence. A thoughtful plan is an act of care. It reduces burdens, clarifies wishes, and allows our values to continue shaping the future long after we're no longer here to guide it.

I created this guide because I believe estate planning can be simple, grounded, and aligned with the principles that matter most to us. And I believe it can be done in a way that honors the Earth, supports your loved ones, and strengthens the world they will inherit.

I'm grateful you're here, and I'm honored to walk with you as you explore your options.

What is Estate Planning, Really?

Estate planning is often talked about as if it's only about documents, taxes, or what happens after we're gone. **But at its heart, estate planning is about care.** Care for the people you love, care for the future you're building, and care for the world you'll leave behind.

A good estate plan gives your family clarity during difficult moments. It answers questions before they arise, reduces stress, and ensures your wishes are honored. Anyone who has people they love, causes they care about, or a vision for the future can benefit from thoughtful planning.

At its simplest, estate planning helps you:

- Decide who will care for your children if something happens to you
- Choose who can make financial or medical decisions on your behalf
- Ensure your assets are transferred smoothly and according to your wishes
- Reduce unnecessary conflict, confusion, and court involvement
- Capture the values, stories, and commitments that define your life

But estate planning can also be something more, something deeply aligned with your environmental and community values.

When you plan with intention, you can:

- Support the causes and organizations that reflect your love for the Earth
- Choose sustainable burial and memorial options
- Reduce paper waste and simplify the administrative burden on your family
- Create a legacy that strengthens your community and the planet
- Pass on not just your assets, but your principles, your hopes, and your vision for a healthier world

Estate planning is ultimately about shaping the future — for your family, your community, and the Earth we all share. When done well, it becomes an act of love, stewardship, and responsibility.

What Are The Essential Pieces of A Good Estate Plan?

A solid estate plan gives your loved ones clarity, reduces stress, and ensures your wishes are honored. While every plan looks a little different, most plans include the same core components. Here's what they are — and how you can make each one reflect your values.

1. A Will or a Trust - These documents outline who receives your assets and who is responsible for carrying out your wishes.

- A Will goes through the court process (probate).
- A Trust can help your family avoid probate and keep things private and streamlined.

Green considerations:

- Choose digital storage and secure cloud backups to reduce paper waste.
- Consider leaving gifts to environmental or community organizations that reflect your values.

2. Guardianship Planning for Children - If you have young children, naming guardians is one of the most important decisions you can make. A comprehensive Kids Projection Plan® prevents confusion and ensures your kids are cared for by the people you trust most.

Green considerations:

- Include guidance about the values you hope your children grow up with — including your connection to nature, sustainability, and community.

3. Powers of Attorney (Financial & Medical) - These documents name the people you trust to make decisions for you if you can't make them yourself during your lifetime.

- Financial Power of Attorney: manages money, bills, and legal matters.
- Medical Power of Attorney: makes healthcare decisions on your behalf.

Green considerations:

- Choose agents who understand your values, including your preferences around medical care, environmental impact, and your burial or memorial preferences.

Continued: What Are The Essential Pieces of A Good Estate Plan?

4. Advance Healthcare Directives - This document outlines your wishes for medical care, including end-of-life decisions. It gives your loved ones clarity and prevents unnecessary stress during difficult moments.

Green considerations:

- Include preferences for eco-friendly end-of-life options and after-death care so you may return to the earth naturally.

5. Asset Alignment - Even the best documents won't work if your assets aren't titled correctly. Proper alignment ensures your plan functions the way you intended.

Green considerations:

- Use digital tools to track and organize your assets.
- Consider sustainable investment options that reflect your values and support a healthier planet.

6. Legacy Planning - Your legacy is more than what you own. It includes your values, stories, traditions, and the commitments you hope your family carries forward.

Green considerations:

- Record letters, videos, or messages about your environmental values, community involvement, and hopes for future generations.
- Share the principles that guide your decisions — including your care for the Earth.

A thoughtful estate plan protects your loved ones and gives you the chance to shape the future in a way that reflects who you are. When you weave your environmental and community values into each piece, your plan becomes more than a set of documents — it becomes a meaningful expression of your life and your legacy.

What Makes Estate Planning Green?

At its core, green estate planning is simply estate planning that reflects your love for our Earth, your community, and the future your loved ones will inherit.

Here are some of the ways you can make your plan more sustainable, intentional, and aligned with your values.

1. Support Environmental and Community Organizations

Your estate plan can be a powerful tool for supporting the causes you care about. You can:

- Leave a gift to a conservation or climate justice nonprofit
- Contribute to a donor-advised fund with an environmental mission
- Support local land trusts or community organizations
- Encourage future generations to continue this work

These choices help your legacy contribute to a healthier, more resilient world.

2. Choose Environmentally Conscious Burial and Memorial Options

Traditional burial and cremation can have significant environmental impacts. Today, Coloradans have many choices of values-align providers offering alternatives, such as:

- Natural or conservation burial
- Water Cremation
- Terramation
- Be A Tree™ Cremation
- Eco-conscious funerals, memorial services, and celebrations of life

Including these preferences in your plan ensures your wishes are honored and reduces the burden on your family.

Continued: What Makes Estate Planning Green?

3. Reduce Paper Waste and Simplify Administration

Estate planning doesn't have to involve stacks of paper. You can:

- Use secure digital storage for documents and grant secure access as needed
- Organize and track assets electronically
- Choose a lawyer who uses low-waste, low-carbon systems and supplies
- Reduce the administrative burden on your family by keeping organized everything in one place, streamlined and accessible

A more organized plan is also a more sustainable one.

4. Align Your Investments With Your Values

Your financial and legal decisions can support the world you want to help create. Consider strategies like these:

- Work with professional legal and financial advisors who share your values and commitment to sustainability
- Choose banks, credit cards, and insurance companies that don't finance fossil fuels
- Prioritize sustainable or ESG-aligned investment options and divest from industries that conflict with your values

A green estate plan can be the first steps in aligning your financial life with your values.

5. Pass On Your Environmental Values

Your legacy is more than your assets — it's your principles, your stories, and the way you've chosen to live. You can:

- Record letters or videos about your environmental commitments
- Share the experiences that shaped your love for nature
- Offer guidance for future generations about stewardship and community care
- Encourage your family to stay connected to the land, wildlife, and places you cherish

These intangible gifts often become the most meaningful part of a plan.

Why Work With a Personal Family Lawyer® for Green Estate Planning

Small Planet Law is proud to be a member firm of the Personal Family Lawyer® network of over 700 estate planning lawyers nationwide.

We believe that estate planning has transformational potential for individuals, families, and communities. Done right, estate planning can bring clarity and peace of mind that lasts a lifetime and well beyond. That's where the Personal Family Lawyer® approach makes a meaningful difference.

Most traditional estate planning focuses on one-off transactions and one-size-fits-all documents. But families deserve more than paperwork. You deserve a lawyer who takes the time to understand your goals, your relationships, and the principles that guide your life — including your commitment to community and care for the Earth.

A Personal Family Lawyer® offers a relationship-based approach designed to support you long-term, not just at the moment your documents are signed. That means:

- Clear, flat fees so you always know what to expect
- A warm, accessible process without legal jargon
- Regular plan updates as your life, assets, and values evolve
- Support with asset alignment so your plan actually works
- A focus on legacy, not just legal forms — including the values, stories, and commitments you want to pass on

Estate planning requires nuance. No matter what aspects of green planning resonate with you, you will benefit from working with someone who is rigorously trained and certified in estate planning and can help you navigate your choices with clarity and confidence.

When you work with a Personal Family Lawyer®, you're not just completing a set of documents. You're building a thoughtful, values-aligned plan that will actually protect your family when they need it most. Small Planet Law helps you bring that same level of care to the larger world and the future you want to help create.

QUESTION

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How do I get started on my own Green Estate Plan?

Now that you've explored the essentials of estate planning — and the many ways to make your plan more green — your next step is taking action. Crafting your own Green Estate Plan will protect the people you love, support the causes you care about, and ensure your values continue to shape the world long after you're gone.

As a thank-you for reviewing this guide, I'd like to offer you a Life & Legacy Planning Session™. During this session, you'll get more financially organized than you've likely ever been, gain clarity about your options, and begin shaping a plan that truly reflects your family, your values, and your vision for a healthier planet.

You can begin by booking a call at SmallPlanetLaw.com or calling our office today at 303-535-4311 to schedule your Life & Legacy Planning Session. **Be sure to mention this guide to receive the planning session at no charge.**

Small Planet Law would be honored to support you and your family as you take this important step toward a more secure and intentional future.



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Here's the bottom line:

You want an estate plan that protects your loved ones, reflects your values, and supports the kind of future you want them to inherit. That means working with someone who can give you clear guidance, help you make confident decisions, and honor both your family and your values.

That's the heart of the Personal Family Lawyer® approach — and it's how we practice estate planning at Small Planet Law. Thoughtful planning, grounded support, and a process that aligns with your life, your values, and your vision for a better world.