



# Family Legacy Preservation

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We believe estate planning includes preserving your legacy and inspiring your children, grandchildren, and future generations.

One of the greatest gifts your heirs can receive is understanding and insight into your experiences, values, ethics, and faith. As a complement to traditional estate planning, we have established Family Legacy Preservation. This unique service offers you the opportunity to create a personal narrative and professionally edited video that will provide your heirs with a legacy in a way they can cherish for years to come.

Family Legacy Preservation Program™ is a five-step process that will identify and document who you are, what you stand for, and the guidance and wisdom you wish to leave behind as a lasting legacy.

**Step 1. The Gathering Process.** The first step begins before our initial meeting and involves completion of our Client Questionnaire. The Client Questionnaire will ask for details regarding your family history, current assets, and current estate planning documents. Unique family circumstances are also identified during this step. Some of our existing clients may have already completed the Questionnaire. Once the Questionnaire is complete, we will provide additional questions about you and your family for you to contemplate in preparation for Step 2.

**Step 2. The Legacy Question Approach.** Using the Questionnaire and additional questions as a guide, we will meet with you to explore your values and dreams for your descendants, and to identify the life guidance and wisdom you can offer your loved-ones. We will use our years of experience in working with hundreds of families in many settings to assist you in identifying principles and values you wish to preserve for your descendants.

**Step 3. The Legacy Response Profile.** The information gleaned from Step 2 will be distilled into a written narrative. You will have the opportunity to review this narrative and make changes in order to further elaborate on the questions and issues identified in Step 2. We will work with you closely until the document clearly expresses your intent. The conclusion of this step is a meaningful narrative that can benefit future generations.

**Step 4. The Legacy Preservation Video.** Once Step 3 has been completed and the issues and questions have been fully explored and documented, we will meet to ask the questions again and have your responses captured on video by a professional videographer. The video will be edited carefully to weave meaningful family photographs, music and other pictures into the final product. The video allows for more complete communication from you than permitted in a document alone.

**Step 5. The Legacy Review.** Family Legacy Preservation™ may put you in touch with what you wish to accomplish with your legacy in a more profound way than you have ever experienced before. At this point, we review your documents and directions that presently exist and compare them to your clarified guiding principles and seek to identify inconsistencies. Our goal is to work with you to bring harmony to your legacy to benefit your family.

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