

Worksheet 7

My legacy beyond money

Goes with: Chapter 16

Your funeral wishes, the things that carry your family’s story, the people and the pet you want cared for, and the gifts you have already made.

Name

Date completed

A. My funeral wishes

Burial or cremation

Funeral home

Prepaid contract? Kept where

How the funeral is funded

My care home has the funeral home’s name (yes or no)

Shared with

Service, music, readings and other wishes

B. Heirlooms and personal belongings

Item	To whom	Why it matters, or its story	Kept where

Item	To whom	Why it matters, or its story	Kept where

C. My pet

Pet's name and kind

Who has agreed to take it

Care notes (vet, food, medicine, habits) and money set aside

D. Gifts I have made while alive

Record each one as a gift or a loan, so the rest of the family knows where they stand (Chapter 16).

Date	To whom	Amount or item	Gift or loan	Written record kept where

E. Life insurance and charitable gifts

Insurer or charity	Policy or gift	Beneficiary	Purpose

Letter of wishes written? (date)

Kept where

What I want my family to remember, and the values behind my choices

Checklist (Chapter 16)

- ☐ My funeral wishes are written and shared
- ☐ I have chosen a funeral home, and my care home has its name
- ☐ My funeral is funded, and my executor knows how
- ☐ Every beneficiary designation matches my plan
- ☐ I have a list of heirlooms and a letter of wishes
- ☐ Someone has agreed to take my pet
- ☐ My online accounts are listed, my wishes for them are written down, and one trusted person knows where the list is kept
- ☐ Any gift I have made is recorded as a gift or a loan
- ☐ Before moving money or investments to my spouse or a grandchild under 18, I asked how the income will be taxed
- ☐ If I lent money to family at the prescribed rate, the interest is paid by January 30 every year
- ☐ Photographs are labelled, and the stories behind the heirlooms are written down or recorded