

**FINANCIAL BASICS**

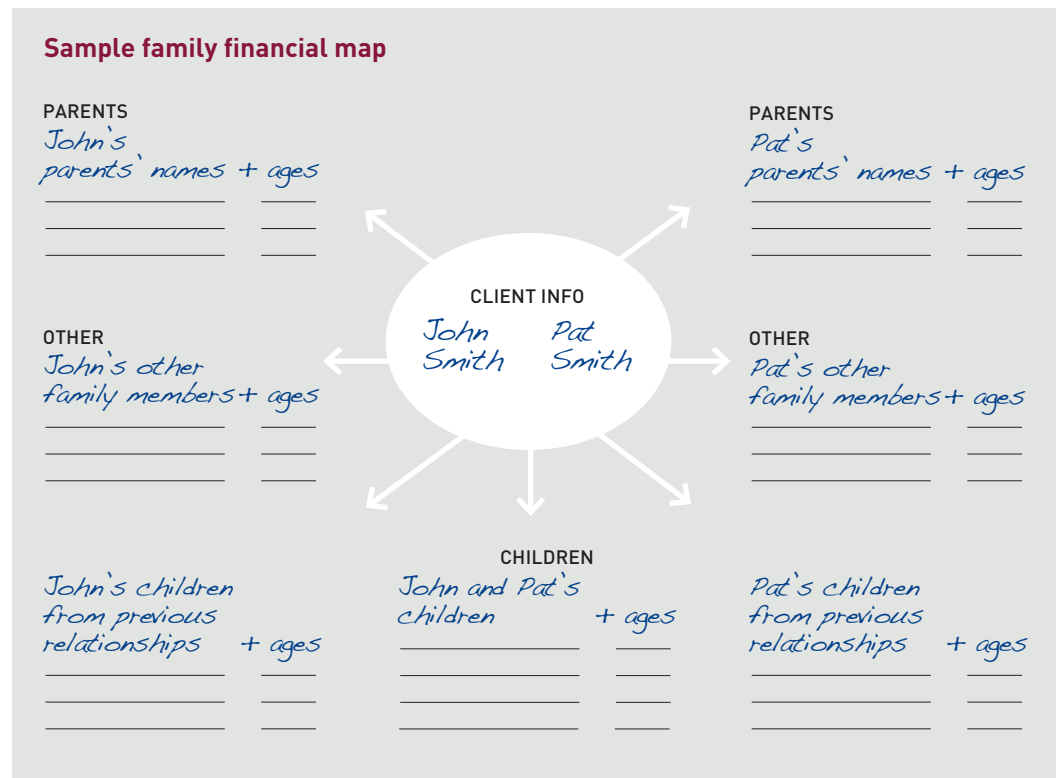


Use this worksheet to create a map of your family, looking up, down and perhaps sideways in your family to identify those who are most important or dependent on you.

This example is for illustrative purposes only and is not intended to predict the returns of any investment choices.

**FAMILY FINANCIAL MAP**

Planning a thoughtful and effective transfer of family wealth can be challenging. The first step is to fully consider who you may need, or want, to provide for in your legacy plans. Use this worksheet to help map out your immediate and extended family members so you will have a clear picture of who you and your advisors may want to plan for. Planning wealth transfer can give you peace of mind because it helps your loved ones avoid common and costly mistakes.



This material should be used as helpful hints only. Each person's situation is different. You should consult your investment professional or other relevant professional before making any decisions.

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# Family financial map worksheet

<p><b>PARENTS</b></p> <p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p>		<p><b>PARENTS</b></p> <p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p><b>OTHER</b> <i>(i.e. nieces, nephews, etc.)</i></p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p><b>CLIENT INFO</b></p> <p>Names</p> <p>_____</p> <p>_____</p>	<p><b>OTHER</b> <i>(i.e. nieces, nephews, etc.)</i></p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p><b>CHILDREN</b></p> <p>Names _____</p> <p>Ages _____</p>	<p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>

**Your information**

Date completed: \_\_\_\_\_

Special needs: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Family member emergency contact**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: