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Life & Legacy Planning

Life & Legacy is a tool for families to use during a family crisis or loss of a loved one. It provides timely and accurate information that can help ease the emotional burden of needing to provide and sort through the details of life. The struggle of trying to find information costs time, money, and exacts an emotional toll on all those involved. **A family emergency is hard for everyone but can be made easier.**

With Life & Legacy Planning we act as your personal assistant. We work with you to gather your information and organize it for you and your family. Easy access is provided both digitally and by physical copy. Additionally, you can update your plan throughout the year or wait until we meet for your annual review of your Life & Legacy Plan. As Thomas Scott said, "A person cannot leave a better legacy to the world than a well-educated family."

Below is our process, from the first meeting to the final analysis.

Initial Meeting:	Set the timeline for completing your Life & Legacy Plan.
Key Information:	Personal information and a Who's Who of contacts.
Essential Documents:	Create a map of documents and name who can navigate them.
Medical Information:	Health insurance information, doctors & prescriptions for you and your family.
Financial Information:	Where personal accounts are held, retirement plan information & liabilities.
Digital Information:	List your online subscriptions, email addresses, and online accounts. Also records who has access to the accounts.
Legacy Information:	Family stories and memories to be passed on. Wishes for final arrangements.
Analysis:	Review all steps, discuss any additional information that needs to be located and relax knowing everything is pulled together!

The Plan

Below is the list of services we provide you and your family. From the day you start, we are committed to keeping your information organized and current. You can call the office with any change(s) to any part of the Life & Legacy Plan and we will update it for you. Our work with you is designed to give relief to not only you, but your loved ones as well.

	Your Personal Assistant
Personal setup tailored to client(s) needs	✓
Completion of personalized guides	✓
Complete needs analysis	✓
Physical copy with guides & key documents	✓
Digital vault & ability to give access to key people	✓
Annual review with client (and designee)	✓
Annual updated hard copy	✓
Digital access to all accounts in one location	✓
Digital storage of pictures and video	✓
Full office support during crisis & beyond	✓
One Time Setup Fee	**$1,000**
Yearly Maintenance Fee	**$500**

MASON WEALTH MANAGEMENT
Life and Legacy Planning