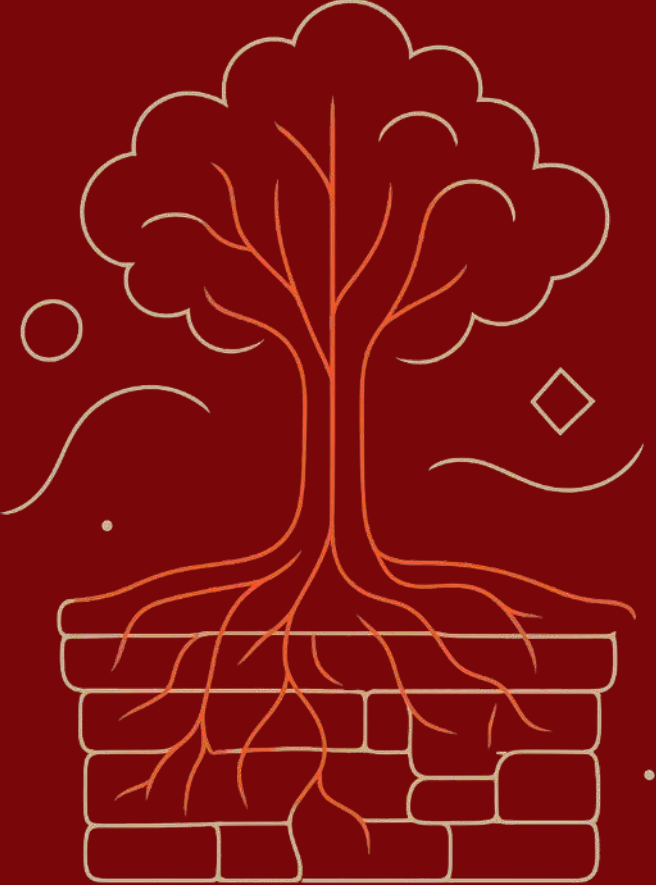




Legacy Readiness

How to Protect What You Built for Your Children, Family & Future

Prepare your documents, wishes, assets, and leadership plan before life happens.

THE STRATEGY COUNSEL

FUNDABLE • VISIBLE • COMPLIANT



Welcome — Why Legacy Readiness Matters

You have worked hard to build something meaningful — a business, a ministry, a career, a family, a mission. But most founders, parents, and leaders spend years creating wealth, influence, and opportunity without ever taking the time to protect it.

Legacy Readiness is the intentional process of organizing your documents, decisions, assets, and wishes so that the people you love — and the mission you lead — are protected no matter what happens next.



This webinar is your invitation to shift from builder to protector. Both roles matter equally.

Building Is Not Enough — You Must Preserve It

What You Built

- A thriving business or nonprofit
- Real estate and financial accounts
- A reputation and community influence
- A family culture and set of values
- Intellectual property and digital assets

What Can Disappear Without a Plan

- Decision-making authority for your business
- Access to accounts and key accounts
- Guardianship rights for your children
- Your charitable mission and ministry vision
- Generational wealth — passed to probate, not your heirs

Building is an act of courage.
Preserving is an act of love. The two must work together.



What Happens When There Is No Plan

When a founder, parent, or leader passes away — or becomes incapacitated — without a plan in place, the consequences fall hardest on the people they love most. Courts make decisions your family should make. Businesses stall while legal processes unfold. Families grieve and fight simultaneously.

Probate Court

Assets are frozen and distributed by a judge — not by your wishes. This process can take months or years and drain estate value.

Family Conflict

Without clear instructions, even close families can fracture over property, money, and guardianship decisions.

Business Collapse

Without succession and continuity planning, organizations lose leadership, clients, contracts, and cash flow almost immediately.

Missed Wishes

Medical decisions, funeral arrangements, and personal values are left to guesswork — or worse, to strangers.

Documents Every Adult Should Understand

You do not need to be wealthy to need these documents. Every adult — especially every founder, parent, and leader — should have the following foundational legal instruments in place and fully understood by their trusted circle.

1

Last Will & Testament

Directs how your assets are distributed and who cares for your minor children. Without it, the state decides.

2

Revocable Living Trust

Keeps assets out of probate, provides privacy, and gives a named trustee authority to manage your estate immediately.

3

Durable Power of Attorney

Authorizes a trusted person to manage financial and legal matters if you become incapacitated.

4

Healthcare Directive / Living Will

Specifies your medical wishes and names a healthcare proxy to make decisions on your behalf.

 This webinar provides general educational information. It is not a substitute for state-specific legal advice from a licensed estate planning attorney.

Children and Guardianship Planning

If you have minor children, guardianship planning is one of the most urgent and deeply personal decisions you will ever make. Without a named guardian in your legal documents, a court will appoint one – and that person may not share your values, your faith, or your vision for your children's future.



Name a Guardian

Designate a primary and alternate guardian in your will. Have an honest, in-person conversation with them first.



Write a Letter of Intent

Share your parenting philosophy, faith traditions, educational preferences, and values in a personal letter for the guardian to reference.



Fund a Trust for Children

A children's trust ensures money is managed responsibly and released according to your instructions – not all at once.

Business and Nonprofit Continuity

Your organization is not just an asset — it is a living mission. Whether you lead a business, a nonprofit, or a ministry, a continuity plan ensures your team, clients, and stakeholders are protected when unexpected transitions occur.

For Business Owners

- Designate an emergency decision-maker
- Document your operating procedures and vendor contacts
- Review your buy-sell agreement with partners
- Update signature authority on business accounts
- Ensure key-person life insurance is in place

For Nonprofit & Ministry Leaders

- Board succession plan with clear authority structure
- Executive Director transition protocol
- Donor relationship documentation and gift agreements
- Program continuity contacts and vendor agreements
- Vision statement and founder's letter for the board

Asset and Account Organization

One of the greatest gifts you can leave your family is an organized picture of what you own, where it is, and how to access it. Without this clarity, assets go unclaimed, accounts go dormant, and real estate sits in legal limbo for years.

01

List All Accounts

Bank accounts, investment portfolios, retirement accounts (401k, IRA), and life insurance policies — include institution name, account type, and contact number.

03

Confirm Beneficiary Designations

Review and update beneficiary designations on all accounts and policies. These supersede your will and must be current.

02

Document Real Property

List all real estate you own — primary home, rental properties, land — along with deed locations, mortgage lenders, and property manager contacts.

04

Organize Physical Documents

Keep originals in a fireproof safe or safety deposit box. Leave copies — with access instructions — in your Legacy Readiness Binder.

Passwords, Digital Assets, and Key Information

In today's world, a significant portion of your financial life, business operations, and personal records exist entirely online. Without a secure system for passing on this access, your family may be locked out of critical accounts at the worst possible moment.



Password Vault

Use a trusted password manager. Leave emergency access instructions and the master passphrase in a sealed, secure location.



Digital Accounts

Document all email addresses, social media accounts, website logins, subscription services, and cloud storage platforms.



Crypto & Digital Assets

List wallet types, recovery phrases (stored securely offline), and any exchange accounts. Crypto lost is often lost forever.



Critical ID Numbers

Social Security numbers, EIN for your business, passport numbers, driver's license, and professional license IDs should all be documented securely.

Family Instructions and Emergency Contacts

Beyond legal documents and financial accounts, your family needs a clear, human roadmap for what to do in the days immediately following a crisis. This section of your Legacy Binder is often the most read — and the most needed.

Immediate Emergency Contacts

List your attorney, CPA, financial advisor, insurance agent, and trusted family friend — with phone numbers and the role each person plays.

Location of Key Documents

Clearly state where your will, trust, and other legal documents are stored — including the name and contact of your attorney's office.

Step-by-Step First 72 Hours Guide

Write a brief, plain-language guide for your family: who to call, what not to sign, what accounts to pause, and who has authority to act.

Family Communication Plan

Identify who will communicate news to extended family, employees, and community — and what message should be shared publicly.

Healthcare, Funeral, and Personal Wishes

These are the most personal conversations — and often the most avoided. But leaving your wishes documented removes an enormous burden from your loved ones during an already devastating time. Your family should not have to guess what you would have wanted.

Healthcare Wishes

- Who is your healthcare proxy or agent?
- Resuscitation and life support preferences
- Organ donation decisions
- Preferred hospital and physician
- Any known allergies or medical conditions

Funeral & Memorial Instructions

- Burial or cremation preference
- Religious or cultural traditions to honor
- Preferred funeral home or service provider
- Songs, scriptures, or readings for the service
- Pre-paid funeral arrangements, if any

Consider writing a personal letter to be read at your service — your own words, your final gift.

Leadership Continuity for Founders

As a founder, your most urgent continuity risk is not financial — it is operational. Who makes decisions on Monday morning if you cannot? Your organization, your employees, and your mission depend on you answering that question now, not later.

1

Identify Your Successor

Name an interim leader formally — in writing, not just verbally.
Share this with your board or leadership team.

2

Document Your Role

Write a "What I Do" document: key decisions you make, relationships you manage, and knowledge only you hold right now.

3

Transfer Authority

Ensure signature authority, vendor access, banking permissions, and platform credentials can transfer immediately to your designee.

4

Brief Your Board or Advisor

Have an annual conversation with your board or trusted advisor to review and update your continuity plan as your organization evolves.

What Your Family Should Know

Your family — your spouse, adult children, or designated next of kin — should not be learning about your financial picture for the first time at a funeral. Legacy Readiness means having intentional, ongoing conversations before a crisis forces them.

Where the Binder Is

They should know the physical and digital location of your Legacy Readiness Binder and who else has access to it.

The Basics of What You Own

They do not need every detail today, but they should understand the categories — accounts, property, insurance, and business interests.

Who to Call First

Your attorney, financial advisor, and CPA should be known contacts — not names they have to search for during a crisis.

Your Wishes and Values

Share your values letter, guardianship preferences, and the "why" behind your legacy plan. This is the conversation that matters most.

What Your Team Should Know

Your employees, contractors, and ministry volunteers carry your mission forward every day. In a crisis, they need clarity — not confusion. A brief, intentional team continuity plan protects your people and your mission simultaneously.

Who Is In Charge

Your team should know exactly who has interim authority — by name and role — and how decisions will be made in your absence.

Where Key Files Live

Shared drives, project management tools, vendor contacts, and client files should be organized and accessible to authorized team members.

Payroll and Contracts

Your interim leader should know where payroll is processed, who the payroll contact is, and where active contracts are stored.

Communications Protocol

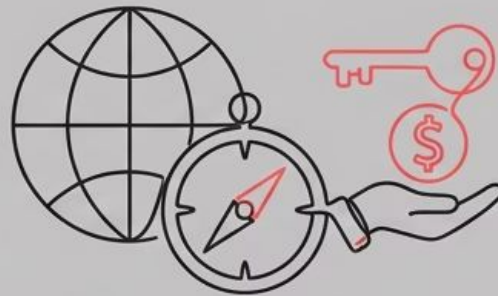
Define how the team will communicate internally — and who speaks to clients, donors, or the public — during a period of transition.

What Your Trusted Person Should Be Able to Find

Your executor, trustee, healthcare proxy, or designated trusted person is the individual who will carry out your wishes. Their ability to act quickly and accurately depends entirely on how well you have prepared what they need to find.



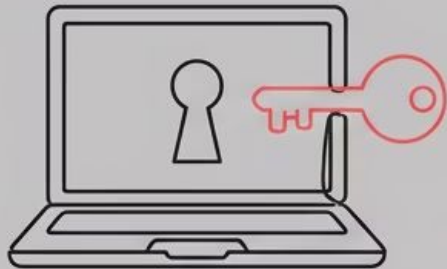
Legal Documents
(will, trust, POA,
healthcare directive)



Financial Map
(accounts, policies,
investments, property deeds)



Business Files
(continuity plan, signature
authority, vendor contacts)



Digital Access
(password vault location,
email, key platforms)



Personal Instructions
(guardian letter, funeral
wishes, values letter)



Key Contacts
(attorney, CPA, advisor,
family members)

Review this packet with your trusted person annually. Do not leave them guessing — leave them equipped.

Common Legacy Planning Gaps

Even well-intentioned leaders often have significant blind spots in their legacy planning. These are the most common gaps we see — and each one carries real consequences for the families and organizations left behind.



Outdated Beneficiaries

Life insurance and retirement accounts often list an ex-spouse or deceased parent. These designations override your will.



No Trust Funding

A trust was created but assets were never transferred into it — meaning the trust cannot function as intended at death.



Unnamed Guardians

Parents of minor children have a will but never formally named a guardian — or named one who is now unavailable or unwilling.



No Business Succession

A founder has a personal estate plan but no formal succession plan for the business — leaving employees, partners, and clients exposed.



Lost Digital Assets

Cryptocurrency, online businesses, and digital accounts are completely inaccessible because no one knows where the credentials are.



No Healthcare Directive

Without a living will, families face agonizing medical decisions without guidance — and hospitals defer to legal next-of-kin, not trusted friends.

Legacy Readiness Binder Walkthrough

The Legacy Readiness Binder is a physical and digital organizational system that brings all of your critical information into one trusted place. Think of it as the owner's manual for your life, your business, and your legacy.

1

Tab 1: Legal Documents

Will, trust, powers of attorney, healthcare directive, and marriage/birth certificates.

2

Tab 2: Financial Map

All accounts, policies, investments, real estate, and beneficiary designations.

3

Tab 3: Business & Org Files

Succession plan, vendor list, operating agreements, and board contacts.

4

Tab 4: Digital Access

Password vault instructions, key account logins, and digital asset documentation.

5

Tab 5: Personal Wishes

Healthcare directive, funeral instructions, guardian letter, and personal values letter.

Download Included: Legacy Readiness Binder Checklist

What's Inside the Checklist

This comprehensive, print-ready checklist walks you through every section of the Legacy Readiness Binder – so you know exactly what to gather, what to document, and what to review with your trusted person.

- ☒ Legal documents checklist
- ☒ Financial accounts and asset inventory template
- ☒ Business and nonprofit continuity checklist
- ☒ Digital access and password tracker
- ☒ Personal wishes and emergency contacts page
- ☒ Annual review reminder and update log

This checklist is your starting point. Every item you check off is protection for the people you love.



Download Included: Founder Emergency Plan



Designed Specifically for Founders, Owners & Mission Leaders

The Founder Emergency Plan is a one-page operational document your team can activate immediately if you become unavailable. It eliminates confusion and protects your organization's momentum when it matters most.

- 🔑 Interim decision-maker — name and authority scope
- 🔑 Key vendor and client contacts
- 🔑 Active contracts and renewal dates
- 🔑 Banking and payroll access instructions
- 🔑 Platform and tool credentials protocol
- 🔑 Board or advisor notification steps

This single page could save your organization. Complete it this week and share it with your designated successor.

Book Your Legacy Readiness Strategy Session

You do not have to figure this out alone. The Strategy Counsel works with founders, families, nonprofit leaders, and mission-driven professionals to build clear, comprehensive legacy plans — one intentional step at a time.



Legacy Readiness Session

A private, one-on-one strategy conversation to assess your current plan, identify gaps, and build your roadmap for Legacy Readiness.



Fundable Founder Series

Join our ongoing educational series for founders and mission-driven leaders — covering strategy, compliance, visibility, and legacy at every stage.



Binder Build Session

A guided, hands-on session to help you complete and organize your Legacy Readiness Binder from start to finish — with expert support.

Protect the work. Protect the people. Preserve the legacy.

The Strategy Counsel — Fundable • Visible • Compliant

📄 This webinar provides general educational information and strategic planning guidance. It is not a substitute for state-specific legal advice from a licensed estate planning attorney. Please consult a qualified professional for advice specific to your situation and jurisdiction.