

BUILDING YOUR RETIREMENT LEGACY LIBRARY

Preserve Wisdom, Values, And Memories For Generations

	YES	NO
1 Have you started collecting personal stories, reflections, or life lessons to share with loved ones?	<input type="checkbox"/>	<input type="checkbox"/>
2 Do you have journals, letters, or digital notes that document meaningful experiences or beliefs?	<input type="checkbox"/>	<input type="checkbox"/>
3 Have you gathered family history, including names, dates, and important events?	<input type="checkbox"/>	<input type="checkbox"/>
4 Have you created or curated photo albums, videos, or keepsakes that tell your story?	<input type="checkbox"/>	<input type="checkbox"/>
5 Do you have a plan to organize and store your materials in a way others can easily access?	<input type="checkbox"/>	<input type="checkbox"/>
6 Have you included explanations of your values, traditions, or guiding principles?	<input type="checkbox"/>	<input type="checkbox"/>
7 Have you recorded or written any personal messages to future generations?	<input type="checkbox"/>	<input type="checkbox"/>
8 Do you revisit and update your materials as your life evolves in retirement?	<input type="checkbox"/>	<input type="checkbox"/>
9 Have you decided who will be the steward or recipient of your legacy library?	<input type="checkbox"/>	<input type="checkbox"/>
10 Have you communicated with family about the importance and intention of your legacy library?	<input type="checkbox"/>	<input type="checkbox"/>

QUESTIONS? CONTACT YOUR FINANCIAL ADVISOR



THE CENTER FOR
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What Your Answers Might Mean:



7–10 Yes Answers: You Are Creating A Meaningful Legacy With Intention: Your efforts are building a rich, lasting library that will offer guidance, connection, and inspiration to future generations.



4–6 Yes Answers: You're On The Right Path But Still Have Work To Do: You've begun capturing your legacy, but organizing and expanding it will make it even more impactful and accessible.



0–3 Yes Answers: You May Be At Risk And Need To Take Immediate Action: Without documentation, your values and memories may be lost—now is the time to begin preserving your unique story.

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