

# A Legacy of Love, Not Loose Paper

## Why It's Time to Get Organized



One of our beloved clients recently shared a photo that said it all: 23 banker boxes stacked high, freshly shredded by a mobile service after **seven months** of sorting through her mother's home.

Inside? Receipts, statements, and tax documents dating back to 1966—the year the house was bought.

She found papers tucked away in shopping bags, file cabinets, lock boxes, drawers, even furniture. It was like a historical excavation, only dustier.

And while she shared it with humor, the reality was clear: it was exhausting.

### **This Isn't Just a Story—It's a Reminder**

It's a reminder that, in the absence of an organized plan, what we leave behind can become a burden for those we love most. But it doesn't have to be that way.

#### **Why Do We Keep It All?**

The short answer? Because no one really tells us what to keep or what to toss. Many of us hold on to documents because:

- **We think we might need them someday.** (What if the IRS comes knocking about 1974?)
- **We're not sure what's important.** So we keep everything—just to be safe.
- **Paper feels like proof.** That we worked, earned, paid, and prepared.

If that sounds familiar, please know—you're not alone, and it's not your fault. Most people were never taught how to prepare for this stage of life.

## **Let's Reframe the Legacy**

At Life By Design Investment Advisory Services, we believe your legacy should be a reflection of your values, not your filing cabinet. Our team can help you:

- Understand exactly what needs to be kept—and for how long
- Create a simplified, organized estate plan that your loved ones can easily follow
- Digitize and declutter your important documents
- Leave behind clarity, not confusion

## **Because We Really Do Love Our Kids**

And love means doing the hard things now—so they don't have to later. It means giving them more time to reflect, grieve, and celebrate the life you lived, not spend months wondering whether a water bill from 1998 is still relevant.

So let's make this a gift—not a project.

**Let's begin your "paper-light" journey toward a beautifully organized legacy. We'll guide you through every step, with care.**

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