



# LEAVE NOTHING UNSAID

The goals of legacy planning is to ensure your plan is carried on through the next generation, reflecting your passions and purpose for an everlasting impact. Your legacy is not exclusively material or financial. A family love letter is the gift you give to the people you love the most, when they need you the most. Have you written yours? For many, this task seems insurmountable- "I love that idea, but I have no idea where to begin" or "That seems really difficult". We have fantastic resources to help you put pen to paper and say what really needs to be said.

## **Writing Your Family Love Letter**

The gift of time, love and clarity. Your family love letter is the key to some unanswered questions your loved ones may have. It's your last message to them along with some of your most important information- assets you hold and how to access them, benefits you're entitled to, your financial & philanthropic preferences, and important contact information.

Come into the office at your convenience to drop off a digital, written, and/or video copy that we will hold safe to hand over to your loved ones at the appropriate time.

Convey your wishes and your most valuable information to your family in this love letter. Equipping your family with this essential letter will help to ease their consternation at a time they need it the most. Schedule your appointment today and discuss your concerns with writing this lasting legacy letter.

## **Estate & Legacy Planning**

Consider scheduling a "Family Legacy Planning Meeting" with Life By Design Investment Advisory Services where we offer a warm and friendly environment, a meeting well planned in advance with your unique family needs in mind and our signature preparedness kit. Communicate your wishes, protect your family and reduce your taxes- these are the areas we'll dive into as we assist you in the preparation of your legacy.

Life By Design Investment Advisory Services is a registered investment adviser. Information presented is for educational purposes only and does not intend to make an offer or solicitation for the sale or purchase of any specific securities, investments, investment strategies, and/or insurance products. Investments involve risk and, unless otherwise stated, are not guaranteed. Be sure to first consult with a qualified financial adviser and/or tax professional before implementing any strategy discussed herein. Past performance is not indicative of future performance.