

Legacy Loop

What's in a will? – and so what?

8-11%



40-50%

What does a supporter need to know?



Family



Beneficiaries



Estate



Pushbacks and pitfalls

- “It’s too complicated”
- “I don’t have the time”
or
- “I don’t have the money”
- “I don’t know what to do”
- “It’s amazing you’re thinking of GiW – can you share?”
- “It’s amazing you’re thinking of GiW – is that the time to think or time to give instructions?”
- Talk about what happens without a will.

Outcomes from the session:

- Understand the task
- Be empowered to listen to supporter needs
- Signpost

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Questions & Discussion