Legacy Loop



What's in a will? – and so what?

8-11%



40-50%





What does a supporter need to know?



Family



Beneficiaries

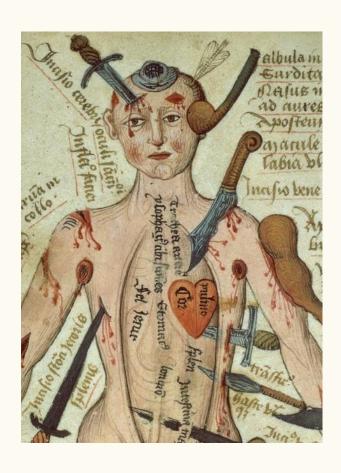


Estate





Anatomy of a will



- Revocation
- Funeral Wishes
- Guardians
- Executors
- Legacies
- Residuary
- Standard Provisions
- Attestation





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





Legacy Loop

Questions & Discussion

