

✓ Facilitate Life Planning In 3 Simple Steps



Life planning, like so many other things, is often harder to begin than to finish. Society shies away from discussing death and its impact on others. As a result, many things are often left undone until it's too late.

In some cases, this just makes it harder on the person tasked with finding and pulling together all the necessary information. In today's digital age, this can mean assets are lost forever.

STEP 1 - Begin the Conversation

You can't finish what you never start. Review these online resources and choose an approach you find most comfortable.

- **The Talk of a Lifetime** (talkofalifetime.org) offers a free workbook to get you started
- **Deathwise** (deathwise.org) download their "Wise Conversations Starter Kit"
- **The Conversation Project** (theconversationproject.org) offers a free starter kit

STEP 2 - Lead By Example

Don't ask a parent or family member to do what you aren't willing to do or haven't yet done. By leading the way, you're protecting your own family from the frustrations of handling your affairs without guidance and access, should something unexpected happen to you.

Leading by example also helps you provide assistance to someone who is hesitant. With your newfound experience, it will be easier to show them how to pull their information together!

STEP 3 - Use and Share Resources

Everplans.com – This online life planning service poses a series of questions to help customize plans, including "to do" lists, resources and forms based on your state. (The basic plan is free; \$75/year for a premium plan with all options.)

GetYourShitTogether.org – An unfortunate name, but an excellent resource for life planning. This site is the brainchild of Chanel Reynolds, who found herself dealing with too many details while grieving the unexpected loss of her young husband. She urges everyone to plan ahead because, "It takes way more energy to worry about something than it does to be relieved." (Free.)

OrganizeMyAffairs.com – Offers both print and digital download versions of two planning products. (Priced from \$15 to \$95.)

NOTE: If you are a small business owner or own an online business, you have additional concerns. Discuss this with your real estate agent. They are small business owners too!

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