PART II – PLANNING DASHBOARD

Planning Category	Have	Review	Need	Unsure/N/A
Will / Last Will & Testament	☐	☐	☐	☐
Revocable Living Trust or Other Trust Planning — When Appropriate	☐	☐	☐	☐
Letter of Instruction	☐	☐	☐	☐
Financial Power of Attorney or Comparable Financial Authority	☐	☐	☐	☐
Financial & Digital Inventory	☐	☐	☐	☐
Physical Asset & Real Estate Inventory	☐	☐	☐	☐
Health Care Power of Attorney or Comparable Health-Care Directive	☐	☐	☐	☐
Health Information Authorization	☐	☐	☐	☐
Family Emergency, Final Arrangements & Legacy Plan	☐	☐	☐	☐
Beneficiary Designation Review	☐	☐	☐	☐
Guardianship & Dependent-Care Planning	☐	☐	☐	☐
Business & Farm Succession Planning	☐	☐	☐	☐
Cross-Border & International Estate Planning	☐	☐	☐	☐
Tax, Asset-Protection & Vulnerable-Beneficiary Planning	☐	☐	☐	☐

My Three Priorities

1. _____

2. _____

3. _____

Preparation Is an Act of Love. • Order Today Creates Peace Tomorrow.

PART III — BUILDING YOUR FAMILY LEGACY SYSTEM

The Family Legacy Binder: A Map, Not a Vault

Good planning is most useful when the right people can locate the right information at the right time. The Christian Legacy Planning™ Family Legacy Binder is a separate implementation resource designed to organize summaries, locations, contacts, and next steps identified through this workbook.

15-CATEGORY CROSSWALK & BINDER COMPLETION DASHBOARD

The legal framework has fifteen planning categories, but the physical binder uses nine tabs. This is the key to keeping the system manageable.

Planning Category	Binder Section	Status
1. Will	2 - Legal & Estate	☐
2. Trust Planning	2 - Legal & Estate	☐
3. Letter of Instruction	2 - Legal & Estate	☐
4. Financial Authority	2 - Legal & Estate	☐
5. Financial & Digital Inventory	3 & 6	☐
6. Physical Assets & Real Estate	4	☐
7. Healthcare Authority	5	☐
8. Health Information Authorization	5	☐
9. Advance Directive	5	☐
10. Emergency / Final / Legacy Plan	1, 8 & 9	☐
11. Beneficiary Designations	2 & 3	☐
12. Guardianship / Dependent Care	2 & 5	☐
13. Business / Farm Succession	4	☐
14. Cross-Border Planning	7	☐
15. Tax / Asset Protection / Vulnerable Beneficiaries	3, 4 & 7	☐

Binder section status: