

Table of Contents

Objectives / Audience	5
Chapter 1: What Is Legacy Planning?	6
Overview	6
Reasons To Do Legacy Planning	7
Misconceptions About Legacy Planning	10
Legacy Planning Evolves Over Time	13
Chapter 2: Understanding Yourself	16
Chapter 3: Finding the Right Legacy-Planning Advisor	21
Qualities Expected of a Legacy Planner	23
Chapter 4: Collating Information	28
Compiling Your Inventory	29
Organising Your Inventory.....	32
Sharing Your Inventory	33
Common Mistakes with Inventories	34
Case Study: Estranged Step-Grandmother's Unplanned Estate	36
Chapter 5: Drafting Wills, Trusts, and Nominations....	41
Drafting Wills	41
Setting Up Trusts	43
Making Nominations.....	45
Ensuring Minors Are Protected	47
Lump-Sum Payments versus Periodic Payments	48
Choosing the Right People for Key Roles.....	50
Case Study: Unwilling Guardian	51

Case Study: Unmarried Life Partner Without Legal Recognition	55
Chapter 6: Family Communication and Plan Implementation.....	60
Communicating the Plan	60
Roles	63
Documenting and Implementing the Plan	64
Case Study: Conflict from Lack of Communication....	65
Chapter 7: Protecting The Legacy	69
Appendix A: Key Legacy-Planning Instruments.....	73
Wills	73
Trusts	73
Insurance Nominations	74
Provident-Fund Nominations	75
Lasting Power of Attorney (LPA)	75
Advance Medical Directive (AMD)	76
Key Differences.....	76
Appendix B: Will-Preparation Form.....	78
Appendix C: Reflection on Life's Final Gifts.....	83
Glossary.....	84
Sources / Further Reading	89
About The Author	90
About Elementum	92