



Coaching Exercise “Financial Health for Families” Follow-Up

Begin your 1:1 meeting by checking in about how things are going. Revisit any goals you are working on. Have you made progress towards them? What can you do in the next week to work on these goals?

Assets come in two forms: tangible and intangible. Having a list of your assets is an imperative part of the estate plan execution process, and as you create your plan, will help you answer important questions. Your assets may include: checking accounts, savings accounts, a life insurance policy, 401(k) or other retirement accounts, a business you may own, copyright or trademark, real estate, vehicles, and social media or digital assets.

What questions should I ask myself when planning for the financial future of my family? Here are a few to get you started:

1. What assets do I have?
2. What are my healthcare wishes?
3. Should I discuss my plans with my family/loved ones?
4. Who will care for my children?
5. Would someone know how to access your online accounts if they need to access them?

Use the Estate Planning Assets Checklist to start planning.