



AfterLight

How to Have "The Talk" About Legacy Planning

Do you want to talk about legacy planning with your adult children, parents or loved ones but don't know how to start ? Here's your step-by-step guide.

MYAFTERLIGHT.COM

About THE FOUNDER

AfterLight is really personal to me. My lived experiences, including the loss of both of my parents, let me to create this company in order to help others in the same situation.

Many times over, I've been where you are right now. I understand how overwhelming and emotionally taxing it can be. But you don't have to do this alone.

My team and I are here to help you manage the expected and unexpected of end-of-life. Whether you're looking for someone to help legacy plan, or you're dealing with the loss of a loved one and don't know where to start, we have ample experience in taking tasks off your plate so you can free up space to breathe.



Rachel Donnelly, Founder & CEO
AfterLight After Loss
Professionals, LLC

**DO YOU NEED
MORE HELP?**

SCHEDULE A CALL



hello@myafterlight.com

www.myafterlight.com

PLANNING AHEAD IS ONE OF THE BEST GIFTS YOU CAN GIVE TO THOSE YOU LOVE.



One of the greatest gifts we can give our family is a legacy plan that preserves your story, protects your family and captures the critical details people often forget to pass on.

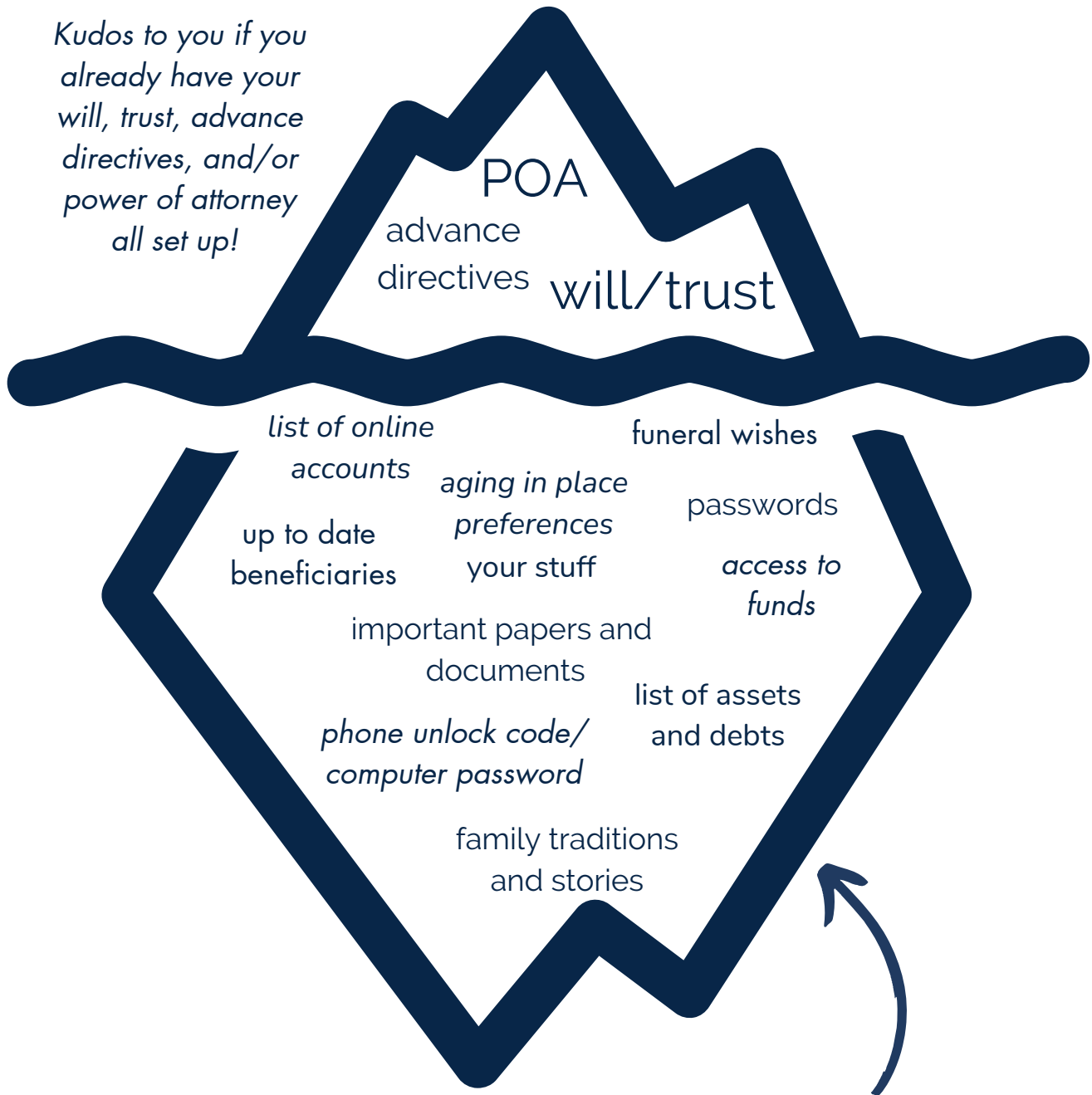
You've spent a lifetime building your legacy.

We're here to help you pass it on.

**When it
comes to
leaving
behind a
legacy, you
need a plan.**

The Legacy Planning Iceberg

*Kudos to you if you
already have your
will, trust, advance
directives, and/or
power of attorney
all set up!*



But what about the rest?



FINANCES

- Will/Trust, Financial Power of Attorney
- List of financial accounts, investments, debts, and liabilities
- Titles, deeds, and certificates
- Insurance - life, home, auto, long term
- Names of attorney, accountant, financial advisor, etc.



DIGITAL ESTATE

- Unlock code to phone, computer/tablet
- Inventory of accounts and assets
- How passwords are stored/organized
- Decide what happen with accounts
- Consult attorney to discuss adding language specific to digital assets in estate planning documents



HEALTHCARE

- If you cannot speak for yourself, who will speak for you and what do they need to know in order to do so?
- Advance Directive for Healthcare and HIPAA Authorization
- Names of doctors and what treatments are being received
- Medical history, list of medications and vaccine status
- Name and type of insurance



AGING

- What makes life meaningful at all cost?
- Discuss pros and cons of aging in place vs. senior living
- Consider whether upgrades/modifications to home needed
- Embrace technology and decide when to hire outside help



END-OF-LIFE

- What worries you most about dying? What's most important?
- Memorial or Funeral wishes? How do you want to be grieved?
- Plans for surviving spouse and/or pets
- Discuss Living Will, DNR order and organ donation wishes



LEGACY

- Family tree, genealogy and medical history
- Family photos, heirlooms and STUFF?
- Memories, recipes traditions to preserve?
- Charities or organizations to support

CONVERSATION STARTERS

- "I need your help with something."
- "I was thinking about what happened to _____, and it made me realize..."
- "I need to think about the future. Will you help me so I know you'll be ok?"
- "Even though you're okay right now, I'm worried that _____, and I want to be prepared."



KEEP THE CONVERSATION GOING

- Share a real-life cautionary tale
- Use books, card games or articles
- Use experiences or holidays as a launch pad to continue or spur more conversation
- Create an annual tradition to discuss family photos, heirlooms, and recipes (e.g. Thanksgiving, Christmas, Hanukkah)



OVERCOMING OBSTACLES

- Write a letter
- Leave a book with them
- Keep trying, don't give up
- Realize it may be YOU
- Bring in a pinch hitter
- If all else fails, hire us to manage down the road



BE PATIENT
EMPATHIZE
DON'T PRESSURE
LISTEN
BE CURIOUS
KEEP NOTES
BE TRANSPARENT
INVOLVE FAMILY
CONSULT AN ATTORNEY

HELPFUL RESOURCES & TOOLS

Click the underlined word to access the resource

ADVANCE CARE PLANNING

- [Five Wishes](#)
- [Genworth's Cost of Care Survey tool](#)
- [The Conversation Project](#)
- [Kitchen Table Conversations](#)

BOOKS & CARD GAMES

- [The Conversation](#)
- [Gentle Art of Swedish Death Cleaning](#)
- [Death Deck](#)
- [Go Wish](#)



FUNERAL & MEMORIAL PLANNING

- [EverLoved](#)
- [Oaktree Memorials](#) - Use promo code 'afterlightoaktree' for 10% off
- [TG Beyond](#)

ORGANIZATION & MEMORY PRESERVATION

- [Artifcts](#)
- [Keylu](#)
- [LifeBook Memoirs](#)
- [Pixorium](#)
- [Infinity Trunks](#) - Use promo code 'afterlight' for 5% off)
- [Dashlane](#)
- [Keeper](#)
- [LastPass](#)

TECHNOLOGY

- [CircleOf](#) - Caregiving App
- [Aloe Care Essentials](#) - Upgraded caregiving hub
- [GetSetUp](#)- tech classes for seniors
- [GoGo Grandparent](#) -helps people order rides with just a phone call
- Install "**Find MY**" on their phone
- [Speak 2 Family](#) -voice activated phone hub
- [Stack Care](#)- Motion detection and data science that sends alerts

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WE'RE HERE WHEN YOU'RE READY

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