



**LEGACY
PLANNING KIT**



Generational Gifting Concept®

**A Guide to Preserve Purpose,
Context, and Intent Across
Generations**

2026



**GENERATIONAL
GIFTING.COM**

IMPORTANT

THIS LEGACY PLANNING KIT IS DESIGNED TO HELP DOCUMENT INTENTIONS, CONTEXT, AND INFORMATION RELATED TO A GENERATIONAL GIFTING PLAN. IT IS FOR EDUCATIONAL AND ORGANIZATIONAL PURPOSES ONLY.

IT DOES NOT PROVIDE FINANCIAL, LEGAL, TAX, OR INSURANCE ADVICE, AND IT DOES NOT REPLACE GUIDANCE FROM APPROPRIATELY LICENSED OR QUALIFIED PROFESSIONALS. THIS GUIDE IS MEANT TO EVOLVE OVER TIME AND BE USED ACROSS GENERATIONS.

HOW TO USE THIS KIT

THIS GUIDE IS DESIGNED TO LIVE ALONGSIDE YOUR GIFTING PLAN – NOT REPLACE IT.

IT CAPTURES THE WHY, NOT JUST THE WHAT.

SOME SECTIONS MAY BE COMPLETED NOW.

OTHERS MAY BE REVISITED YEARS FROM NOW BY FUTURE GENERATIONS.

YOU DON'T NEED TO FILL OUT EVERYTHING AT ONCE.

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A Note Before You Begin

You've reached an important moment. The decisions and steps behind your Generational Gifting plan are now in place, and this Legacy Planning Kit offers a space to reflect on what that truly represents.

This guide is not about technical details or instructions. It's about preserving context, capturing why this plan mattered to you, what values guided it, and how you hoped it would support the generations that follow. Over time, family roles will change, responsibilities will shift, and new perspectives will emerge. This kit helps future generations understand the purpose behind the plan they inherit.

There is no expectation to complete everything at once. This is a living document meant to grow alongside your family. By sharing your thoughts today, you're giving future generations clarity, perspective, and a deeper connection to the legacy you've created.

Let's begin...

WHO CREATED THIS PLAN

THIS SECTION IS WRITTEN BY GENERATION 1 TO PROVIDE PERSONAL CONTEXT. IT HELPS FUTURE GENERATIONS UNDERSTAND WHO CREATED THE PLAN AND WHAT MATTERED TO THEM AT THE TIME.

ADD PICTURE OF THE GIFTOR(S) IN THIS BOX

About the Giftors

WRITE IF HELPFUL:

- **NAME(S) OF GIFTOR(S), RELATIONSHIP TO FUTURE BENEFICIARIES, LIFE STAGE WHEN THIS PLAN WAS CREATED**

REFLECTIONS:

- **“AT THIS POINT IN OUR LIVES, WHAT MATTERED MOST TO US WAS...”**
- **“SOME VALUES WE HOPED TO CARRY FORWARD ARE...”**

A Moment in Time

CAPTURING CONTEXT

PLANS ARE CREATED AT SPECIFIC MOMENTS IN LIFE. THIS SECTION CAPTURES THE CIRCUMSTANCES, EMOTIONS, AND PRIORITIES PRESENT WHEN THE GIFTING PLAN WAS ESTABLISHED.

**THIS HELPS FUTURE GENERATIONS UNDERSTAND WHY DECISIONS WERE MADE
THE WAY THEY WERE.**

REFLECT ON:

- **WHAT WAS HAPPENING IN YOUR FAMILY AT THE TIME?**
- **WHAT CONCERNS OR HOPES INFLUENCED THIS PLAN?**

WRITE IF HELPFUL:

- **“WHEN THIS PLAN WAS CREATED, OUR FAMILY WAS...”**
- **“SOME CHALLENGES OR OPPORTUNITIES WE WERE THINKING ABOUT...”**

Gifting Goals

WHAT THIS PLAN WAS MEANT TO SUPPORT
THIS SECTION EXPLAINS THE PURPOSE BEHIND THE GIFTING PLAN — BEYOND
THE FINANCIAL STRUCTURE.

REFLECT ON:

- **WHAT DID YOU HOPE THIS PLAN WOULD SUPPORT OR ENABLE?**
- **WHAT OUTCOMES MATTERED EMOTIONALLY OR RELATIONALLY?**

WRITE IF HELPFUL:

- **“THE PRIMARY GOALS OF THIS GIFTING PLAN WERE...”**
- **“SUCCESS, TO US, WOULD LOOK LIKE...”**

GOAL 1

Goal 1 Breakdown

GOAL 2

Goal 2 Breakdown

GOAL 3

Goal 3 Breakdown

Gifting Design Framework

HOW THE PLAN WAS STRUCTURED

**THIS SECTION HELPS FUTURE GENERATIONS UNDERSTAND, AT A HIGH LEVEL,
HOW THE PLAN WAS DESIGNED WITHOUT TECHNICAL DETAIL.**



INCLUDE :

- **WHY THIS APPROACH FELT APPROPRIATE AT THE TIME:**
- **KEY CONSIDERATIONS THAT INFLUENCED DESIGN:**

**Include Your Generational Gifting
Plan Design Here**





Utilizing the Gift

SHARED PERSPECTIVE

THIS SECTION ALLOWS THE GIFTOR TO SHARE PERSPECTIVE AND INTENT AROUND HOW THE GIFT WAS ENVISIONED AT THE TIME IT WAS CREATED. IT IS NOT MEANT TO LIMIT CHOICES OR DICTATE OUTCOMES.

**INSTEAD, THESE REFLECTIONS OFFER INSIGHT THAT FUTURE GENERATIONS CAN
CONSIDER ALONGSIDE THEIR OWN CIRCUMSTANCES AND JUDGMENT.**

WRITE IF HELPFUL:

- “WE HOPED THIS GIFT WOULD BE USED TO SUPPORT...”
- “THINGS WE WANTED TO ENCOURAGE INCLUDE...”
- “THINGS WE HOPED TO AVOID INCLUDE...”

Roles & Responsibilities

WHO DOES WHAT - NOW AND IN THE FUTURE

THIS SECTION DOCUMENTS ROLES SO FUTURE GENERATIONS KNOW WHO TO CONTACT AND HOW RESPONSIBILITIES MAY SHIFT OVER TIME.

Name	Role	Responsibilities

Name	Role	Responsibilities

Milestones & Checklists

PLANNING FOR CHANGE OVER TIME

POSSIBLE MILESTONES TO PLAN FOR:

- TRANSFER OF CONTROL TO GENERATION 2
- MAJOR LIFE EVENTS (RETIREMENT, PASSING, EDUCATION MILESTONES)
- PERIODIC REVIEW POINTS

Items To Complete	Deadline	Completed?

Important Dates & Contacts

KEY DATES TO NOTE

- **PLAN ESTABLISHED:** _____
- **LAST REVIEWED:** _____
- **NEXT INTENDED REVIEW:** _____

IMPORTANT CONTACTS

- **GGC PRACTITIONER:** _____
- **INSURANCE CARRIER:** _____
- **OTHER PROFESSIONALS:** _____

Task	Description

Notes

Updating Beneficiary Arrangements

ACKNOWLEDGING FUTURE FLEXIBILITY

This section helps future generations understand that beneficiary arrangements may be reviewed or updated over time, subject to plan terms and professional guidance.

GENERATION 1: THE GIFTOR

At the start, the gifting plan is established and owned by the giftor. During this stage, the giftor controls the plan and names the initial beneficiary or beneficiaries based on their goals and intentions. The giftor may update beneficiary arrangements during their lifetime, subject to plan terms and professional guidance.

GENERATION 2: THE GIFTED (FUTURE OWNER)

At a future point, ownership of the gifting plan may transfer to Generation 2, the gifted. Once this transfer of ownership occurs, the gifted becomes responsible for the plan going forward. As the new owner, Generation 2 may review and, if appropriate, update beneficiary arrangements to reflect their own family, such as naming their children or future generations, always with the guidance of appropriately licensed professionals.

GENERATION 3 (AND BEYOND): FUTURE BENEFICIARIES

Generation 3 may eventually become the beneficiaries of the plan's proceeds. At that point, this guide helps them understand:

- How the plan originated
- Why beneficiary decisions were structured as they were
- The intentions and values that shaped the plan

While beneficiary roles may evolve, the underlying purpose of the plan can remain clear through proper documentation and communication.

Important Note

Beneficiary arrangements are an important part of any gifting plan and may have legal, tax, or insurance implications. Any changes to beneficiaries should be reviewed and completed with the guidance of appropriately licensed or qualified professionals to ensure they are handled correctly and reflect your current intentions.

This guide is intended to provide context and organization only and does not replace professional advice or formal documentation.



Passing Down the Legacy

For future generations

*This section is intended for Generation 3 and beyond.
It explains why this plan existed and what it represented.*

MESSAGE TO FUTURE GENERATIONS:

- “WE CREATED THIS PLAN BECAUSE...”
- “WHAT WE HOPE YOU REMEMBER IS...”
- “THIS GIFT REPRESENTS...”



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