

# Tracking Progress

**A Simple Roadmap & Contact Organizer for  
Your Implementation Journey**



This tracker is designed to help you organize information, contacts, and milestones as your family moves through an implementation process. It is for educational and organizational purposes only. It does not provide financial, legal, tax, or insurance advice, and it does not recommend or direct any specific action. Any decisions or next steps should be made with appropriately licensed or qualified professionals based on your individual circumstances.

# How to Use This Tracker

Implementation can feel like a lot especially when multiple people, documents, and decisions are involved. This tool helps you stay oriented by capturing your key contacts, clarifying who does what, and showing where you are in the process.

You can use it digitally or print it. Update it as things change. The goal is not perfection, it's clarity.

## Section 1: Your Implementation Snapshot

**Why this matters:** When families are moving forward, it's easy to lose track of what has been decided, what is still open, and what's happening next. A simple snapshot helps everyone stay aligned and reduces stress.

### Write if helpful:

- Family / Household Name: \_\_\_\_\_
- Primary Point of Contact: \_\_\_\_\_
- Preferred Communication Method:  Email  Text  Call  Other
- Today's Date: \_\_\_\_\_
- Current Step (circle one): 1 2 3 4 5 6 7
- Next Scheduled Touchpoint (if known): \_\_\_\_\_

# Section 2: Key Contacts & Roles

## Why this matters:

Implementation usually involves more than one person. Keeping roles and contact details in one place prevents confusion, delays, and repeated conversations.

### B. Practitioner & Professional Support

Generational Gifting Concept Practitioner

Name: \_\_\_\_\_

Email/Phone: \_\_\_\_\_

### A. Family Roles

- Gifter(s): \_\_\_\_\_
- Partner/Spouse (if applicable): \_\_\_\_\_
- Family Representative / Coordinator: \_\_\_\_\_
- Other family participants: \_\_\_\_\_

### C. “Who To Contact For What”

- Questions about the process or timeline → \_\_\_\_\_
- Document collection / coordination → \_\_\_\_\_
- Professional guidance (legal/tax/insurance/financial) → \_\_\_\_\_
- Family communication / updates → \_\_\_\_\_



# Section 3: Your Roadmap (Start to Finish)

**Why this matters:** A roadmap reduces anxiety by helping you understand what step you're in, what comes next, and what "done" looks like for each phase. This tracker is designed to help you follow progress without needing technical knowledge.



## Step 1 – Complete the Gifting Workshop

**Where you are:** You are aligning on what matters most and what you want the plan to accomplish.

**What to expect:** Clarifying questions, priorities, and a shared understanding of intent.

**Milestones to complete:**

- Goals and intentions documented
- Key family considerations noted
- Open questions captured

**Notes / questions:** \_\_\_\_\_

## Step 2 – Explore the Initial Gifting Plan Draft

**Where you are:** An initial draft of the gifting plan has been prepared based on the gifting workshop conversation.

**What to expect:** An opportunity to walk through the draft's structure, assumptions, and overall direction

**Milestones to complete:**

- Draft received for personal review
- Draft reviewed with GGC practitioner
- Questions or observations noted

**Notes / questions:** \_\_\_\_\_



## Step 4 – Move Forward & Complete Applications

### Step 3 – Refine & Finalize the Gifting Plan

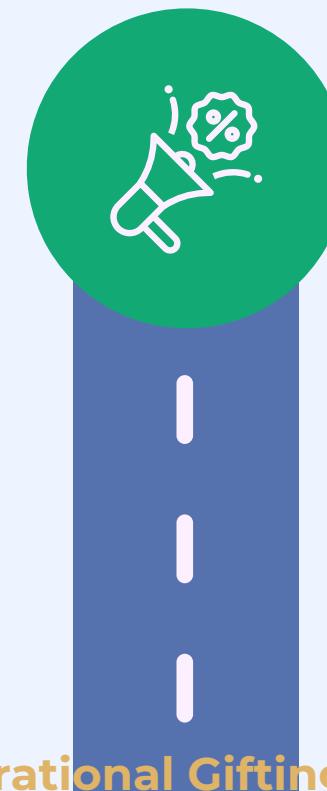
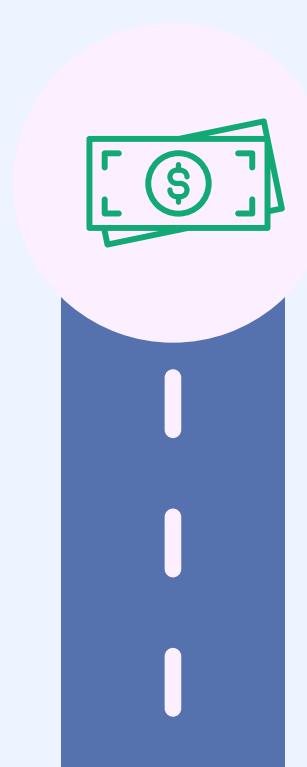
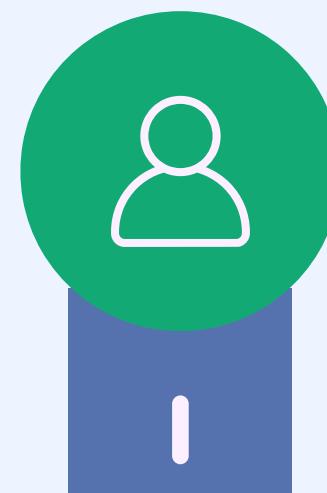
**Where you are:** You've reviewed the initial draft of the gifting plan and identified areas you'd like to clarify, adjust, or explore further.

**What to expect:** A discussion with your Generational Gifting Concept practitioner to review feedback.

**Milestones to complete:**

- Feedback on the initial draft shared
- Revisions incorporated as appropriate
- Final gifting plan prepared & reviewed

Notes / questions: \_\_\_\_\_



## Step 5 – Complete Post-Submission

### Requirements

**Where you are:** Applications have been submitted, and required follow-up items may be requested by the insurer or other involved parties.

**What to expect:** You may be asked to provide additional information or complete follow-up requirements, including underwriting requests related to insurance components, with guidance from your GGC practitioner and other licensed professionals as applicable.

#### Milestones to complete:

- Follow-up items completed and confirmed
- Underwriting requests reviewed
- Follow-up questions addressed

Notes / questions: \_\_\_\_\_



## Step 6 – Review Final Documents & Fund the Plan

**Where you are:** The gifting plan has been approved by the insurer and any other involved parties, and final documents are ready to be reviewed.

**What to expect:** You will review the approved plan and final documents with your GGC practitioner, complete required signatures, and make the initial deposit to fund the plan as applicable.

#### Milestones to complete:

- Questions addressed and clarifications noted
- Required signatures completed
- Funding confirmation received

Notes / questions: \_\_\_\_\_



## Step 7 – Post-Implementation Review & Legacy Planning Kit

### Section 4: Milestone Tracker



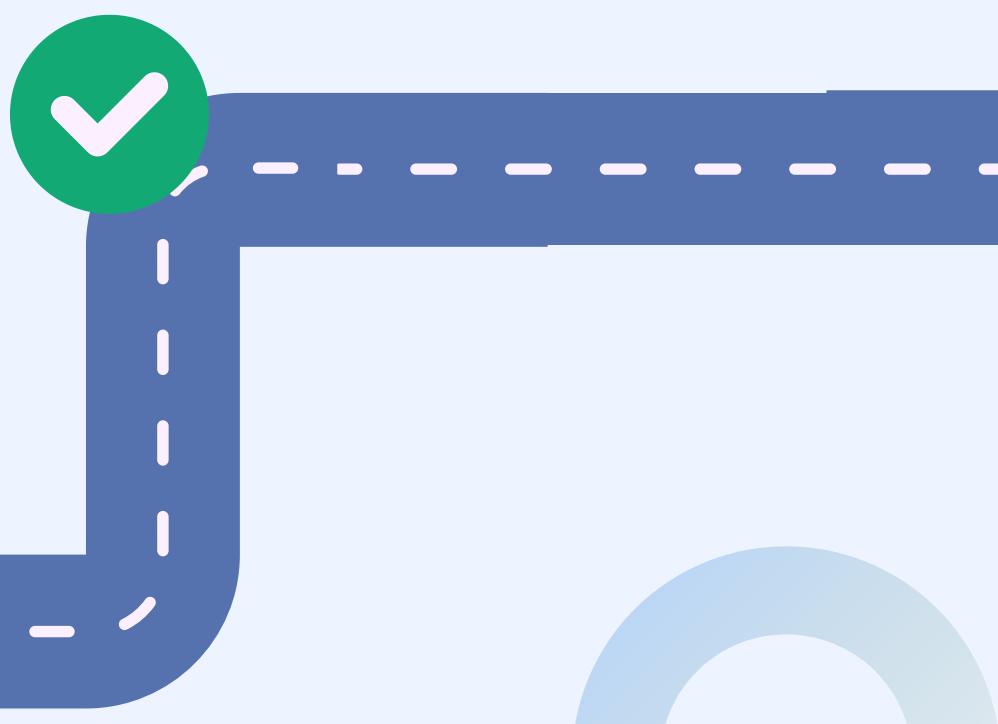
**Where you are:** The gifting plan has been implemented, funding has been completed, and final documents have been issued.

**What to expect:** You will review the completed plan with your GGC practitioner to confirm all steps are complete and, if helpful, work through the Legacy Planning Kit to organize personal intentions and information for the future.

#### Milestones to complete:

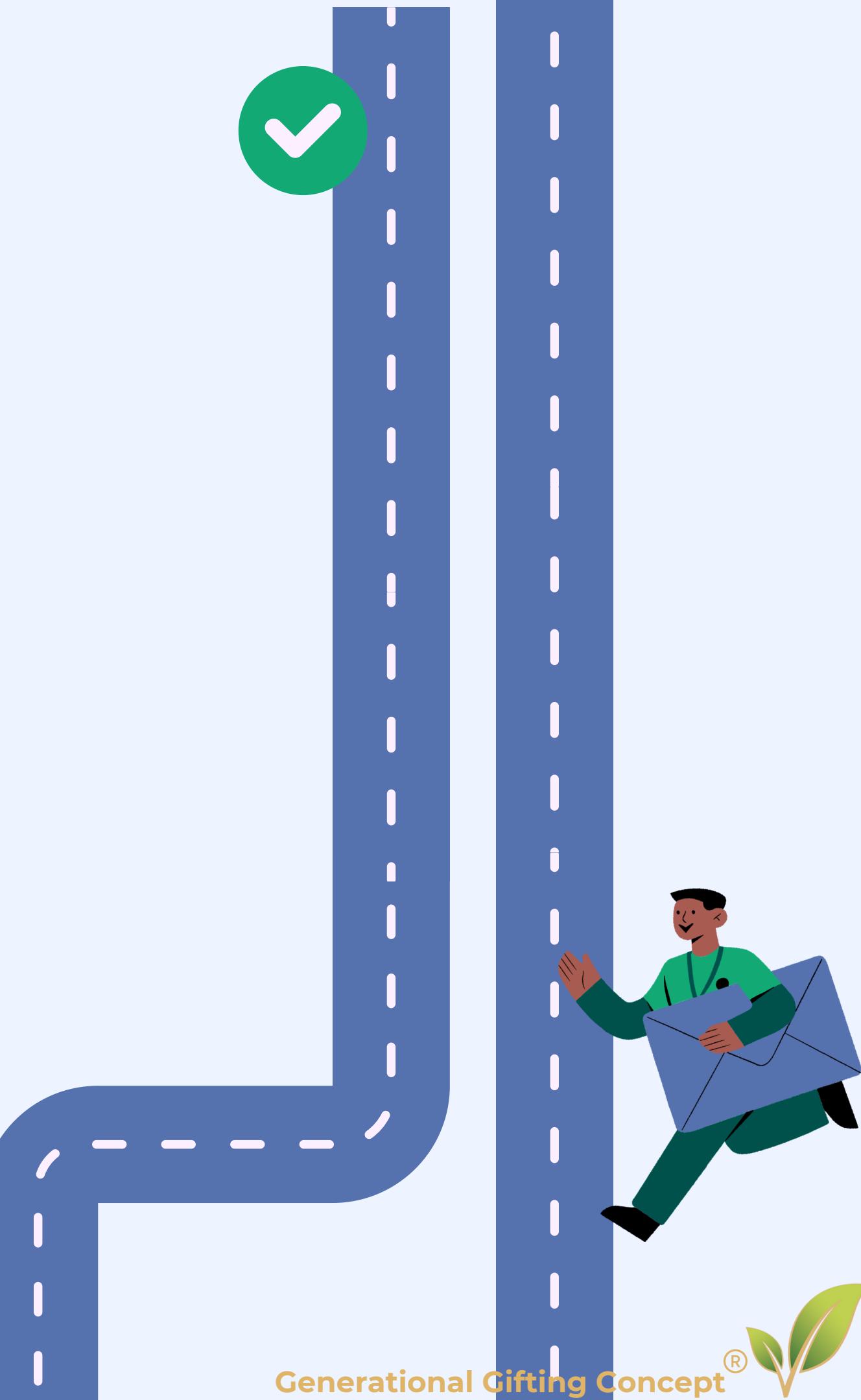
- Implementation confirmed as complete
- All final documents reviewed and accounted for
- Outstanding questions addressed

Notes / questions: \_\_\_\_\_



## Section 4: Milestone Tracker (Quick View)

Use this checklist to quickly see what's been completed and what may still be in progress. Not every item will apply to every family.



### Planning & Drafting (1)

- Gifting workshop completed
- Goals and intentions documented
- Initial gifting plan draft prepared
- Initial draft reviewed with GGC practitioner
- Draft received for personal review

### Applications & Submissions (3)

- Decision to move forward confirmed
- Insurance applications initiated
- Required forms completed
- Applications submitted
- Additional licensed professionals engaged (if needed)

### Approval, Funding & Completion (5)

- Insurer approval received
- Other required approvals confirmed (if applicable)
- Final documents prepared
- Documents reviewed and signed
- Initial deposit submitted
- Funding confirmation received

### Refinement & Finalization (2)

- Feedback on initial draft shared
- Questions and adjustments discussed
- Revisions incorporated
- Final gifting plan prepared

### Post-Submission Requirements (4)

- Submission receipt confirmed
- Post-submission requirements identified
- Underwriting requests reviewed (if applicable)
- Follow-up information provided
- Outstanding items tracked and resolved

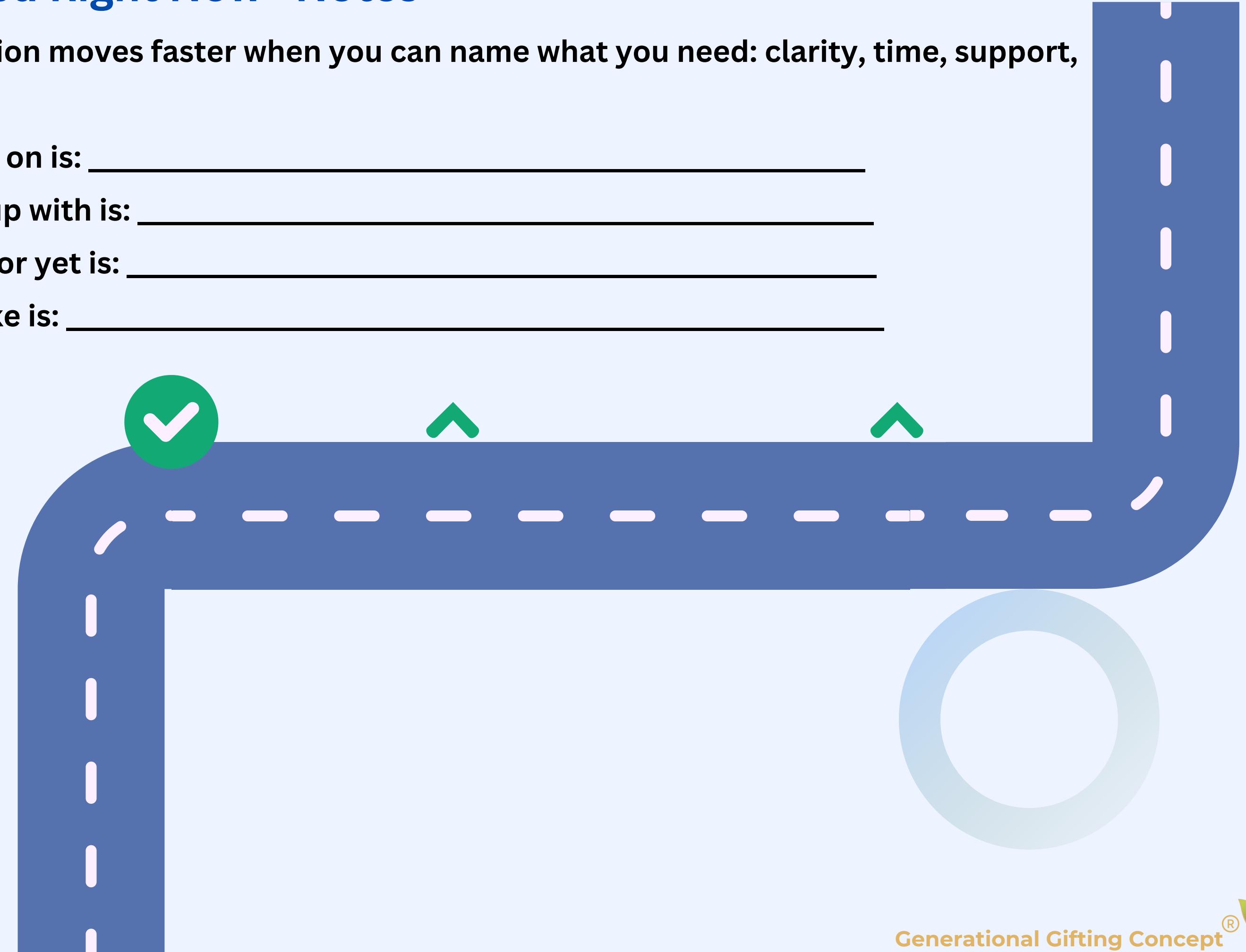
### Post-Implementation Review (6)

- Implementation confirmed as complete
- Final documents organized and saved
- Legacy Planning Kit completed (if desired)
- Questions addressed and clarity confirmed
- Future review or check-in preferences noted (optional)

## Section 5: “What I Need Right Now” Notes

**Why this matters:** Implementation moves faster when you can name what you need: clarity, time, support, or simply the next step.

- The next thing I need clarity on is: \_\_\_\_\_
- The person I should follow up with is: \_\_\_\_\_
- The decision I’m not ready for yet is: \_\_\_\_\_
- The next small step I can take is: \_\_\_\_\_



# Final Note



This tracker is meant to support organization and communication. If questions arise that require financial, legal, tax, or insurance guidance, you are encouraged to consult appropriately licensed or qualified professionals.

