
Your Legacy Beyond Wealth

A Personal Discovery Workbook

Guided Discovery Prompts • Legacy Inventory • Family Mapping
Action Checklists • Reflection Exercises • Priority Planning

M E M O R I A L M E R I T S

Sanctuary, not sales floor.

Share This Resource Freely

This workbook is designed to be shared, printed, and distributed at no cost. If you serve families navigating legacy planning, end-of-life decisions, or grief support, you are welcome to use this resource in your professional practice.

Who Can Use This

This workbook is intended for distribution by professionals and organizations including:

- Hospice and palliative care teams
- Grief counselors and therapists
- Estate planning attorneys
- Financial advisors and insurance professionals
- Senior living communities and activity directors
- Faith communities and pastoral care teams
- Veterans service organizations
- Hospital social workers
- HR departments supporting bereaved employees
- Funeral homes and memorial service providers

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How to Use This Workbook

This workbook helps you discover, organize, and plan the legacy you already carry. It is not a keepsake and it is not a journal. It is the thinking tool that helps you figure out what matters most and what to do about it.

Work through it at your own pace. There are no right answers and no deadlines. Some sections will feel urgent. Others can wait. Trust your instincts about where to start.

What Each Section Does

1. Legacy Inventory takes stock of what you already have: recordings, letters, photographs, documents, traditions. Most people are surprised by how much legacy they have already created without realizing it.
2. The Legacy of Your Voice helps you plan how to preserve the sound of who you are through recordings, voicemails, and messages your family can return to.
3. The Legacy of Your Wisdom guides you toward capturing your values, hard-won lessons, and life philosophy in written form through ethical wills and legacy letters.
4. The Legacy of Your Truth helps you prepare for the difficult but necessary conversations your family needs from you, including wishes, regrets, and unresolved matters.
5. The Legacy of Your History walks you through identifying and preserving the family stories, traditions, and cultural knowledge that only you can pass down.
6. The Legacy of Your Presence helps you recognize and strengthen the traditions, rituals, and shared experiences that become your family's living memory of you.
7. The Legacy of Your Clarity focuses on reducing the practical burden on your family by organizing the information they will need when you are no longer here.
8. Who Needs What maps your family members to the types of legacy that would matter most to each of them, so your efforts land where they count.
9. Your Legacy Action Plan pulls the most important next steps from every section into a single, prioritized list you can act on this week.

Tip: *This workbook pairs naturally with the Legacy Journal, which provides the guided structure for writing your legacy once you have discovered what to include. Think of this workbook as figuring out what to say. The journal is where you say it.*

Legacy Inventory

What You Already Have

Before you start building, take stock. Most people have already created more legacy than they realize. This inventory helps you see what exists so you can protect it, organize it, and fill in the gaps that matter most.

Check everything that applies. Add details where you can.

Recordings and Messages

- Voicemails saved on a phone or device
- Video recordings (holidays, events, casual moments)
- Audio recordings (interviews, conversations, music)
- Voice messages in text or messaging apps
- Video calls that were recorded

Where are these stored? _____

Are any at risk of being lost (old phone, outdated format)? _____

Letters, Writing, and Documents

- Handwritten letters or cards
- A journal or diary (past or current)
- An ethical will or legacy letter
- Military records or service documents
- Immigration or citizenship papers with personal history
- A memoir, autobiography, or life story project
- Recipes written in your handwriting

Where are these stored? _____

Photographs and Physical Keepsakes

- Organized photo albums (physical or digital)
 - Unorganized boxes or folders of photographs
 - Photos with identifying labels (names, dates, locations)
 - Heirlooms or keepsakes with known stories behind them
 - Heirlooms or keepsakes with stories that only you know
- Are any photographs unlabeled that only you can identify?
-

Traditions and Knowledge

- Family recipes passed down orally or by practice
 - Holiday or seasonal traditions you lead or maintain
 - Cultural practices or customs you carry
 - Skills or crafts you could teach (woodworking, gardening, cooking, etc.)
 - Family stories only you know or remember
- Which traditions would disappear without you?
-

Practical Documents and Organization

- A legal will or trust
 - Life insurance policies with current beneficiaries
 - A list of accounts, passwords, or digital access information
 - Funeral or memorial service preferences documented
 - Power of attorney or healthcare directive
 - A letter of instruction for your family
- Does your family know where to find these?
-

Tip: Circle or highlight the items above where you are the only person who knows the story, location, or context. Those are your highest priority. Everything else can wait.

The Legacy of Your Voice

Why Hearing You Matters More Than Reading You

Your family will forget exact words. They will never forget the sound of your voice. A recording captures tone, warmth, humor, and personality in ways that writing cannot. The goal here is not to produce something polished. It is to preserve something real.

Discovery Prompts

Take your time with these. Write as much or as little as comes naturally. You can always return to expand your answers later.

1. If you could leave your family one voice recording to listen to when they miss you, what would you want them to hear?

2. What is something you say all the time that your family would recognize instantly?

3. Is there a story you tell that always gets a laugh or an emotional response? What makes it land?

4. If your grandchild (or a future family member who never met you) could hear your voice for the first time, what would you want that moment to feel like?

5. What song, prayer, or phrase carries deep meaning for you? Why does it matter?

Action Checklist

Check each item as you complete it, or mark the ones you want to prioritize this month.

- Record a short voice memo on my phone saying something I want my family to hear
- Save existing voicemails or voice messages to a secure location
- Ask a family member to record a casual conversation with me
- Record myself telling one family story in my own words
- Identify someone who could help me make a longer recording or video
- Back up all voice and video recordings to a second location

Tip: Start with your phone. A 90-second voice memo recorded in your kitchen is worth more to your family than a professionally produced video you never get around to making.

The Legacy of Your Wisdom

Turning a Lifetime of Hard Lessons Into a Gift

Every difficult experience you survived taught you something your family will eventually face on their own. An ethical will or legacy letter captures the values, principles, and hard-won wisdom you want to pass down. Unlike a legal will, it costs nothing and requires no attorney. It just requires honesty.

Discovery Prompts

Take your time with these. Write as much or as little as comes naturally. You can always return to expand your answers later.

1. What is the single most important thing life has taught you that you want your family to understand?

2. What mistake did you make that you hope your children or grandchildren can avoid?

3. What value or principle has guided your most important decisions? Where did it come from?

4. If you could sit with your family 20 years from now, what advice would you give them about money, relationships, or work?

5. What do you believe about forgiveness, faith, or resilience that you have never put into words?

Action Checklist

Check each item as you complete it, or mark the ones you want to prioritize this month.

- Write a one-page letter to my family about what matters most to me
- Start an ethical will by listing my three most important values and why I hold them
- Write a letter to a specific family member about something only they need to hear
- Read about ethical wills and legacy letters to understand the format
- Explore the Legacy Journal as a guided framework for capturing my wisdom
- Set aside 30 minutes this week to write, even if it feels incomplete

Tip: *Your legacy letter does not need to be long or literary. The most powerful letters are the ones that say plainly what the writer believes and why. Start with one value and one story. The rest will follow.*

The Legacy of Your Truth

Having the Conversations Nobody Wants to Start

The conversations your family needs most are usually the ones everyone avoids. End-of-life wishes, unresolved relationships, financial realities, difficult history. Having these conversations while you can takes extraordinary courage. Not having them leaves your family guessing during the worst moments of their lives.

Discovery Prompts

Take your time with these. Write as much or as little as comes naturally. You can always return to expand your answers later.

1. What conversation have you been avoiding that your family needs you to have?

2. Are there end-of-life wishes you have not communicated clearly? What are they?

3. Is there something you need to say to a specific person that would bring peace to you or to them?

4. Are there financial realities, debts, or obligations your family does not know about that would affect them?

5. What family history or personal truth have you carried alone that should not be lost?

Action Checklist

Check each item as you complete it, or mark the ones you want to prioritize this month.

- Write down my end-of-life wishes in plain language (medical care, memorial preferences, burial or cremation)
- Have one honest conversation with a family member about something that has gone unsaid
- Document any financial obligations, debts, or accounts my family does not know about
- Write a letter addressing something I cannot say in person
- Identify who in my family is the right person to receive difficult truths
- Review my healthcare directive and make sure my family knows where to find it

***Tip:** You do not have to have every hard conversation at once. Start with the one that would remove the most burden from your family if something happened to you tomorrow.*

The Legacy of Your History

Stories Your Family Will Lose If You Don't Share Them

Every family has a living historian, someone who remembers the stories, names the faces in old photographs, and carries the origin stories that give a family its identity. When that person is gone, the stories go with them. This section helps you identify which stories matter most and make a plan to preserve them before they disappear.

Discovery Prompts

Take your time with these. Write as much or as little as comes naturally. You can always return to expand your answers later.

1. What is the oldest family story you know? Who told it to you, and why has it stayed with you?

2. Are there photographs in your collection where you are the only person who can identify the people, places, or dates?

3. What do you know about your grandparents or great-grandparents that your children do not?

4. What family tradition, recipe, or practice has a story behind it that has never been written down?

5. What story from your own life would surprise your family if they knew the full version?

Action Checklist

Check each item as you complete it, or mark the ones you want to prioritize this month.

- Label or caption at least 10 family photographs with names, dates, and locations
- Record myself telling one family origin story
- Write down one recipe in my handwriting with the story behind it
- Create a simple family tree or timeline of major events
- Share one story with a younger family member and ask them what they want to know more about
- Gather unlabeled photographs into one place and schedule time to identify them

***Tip:** Photographs without labels become nameless faces within a generation. Even a pencil note on the back with names and an approximate year is enough to preserve the connection.*

The Legacy of Your Presence

Traditions, Rituals, and the Moments That Become Memory

The moments that define a family are rarely the big events. They are the small rituals repeated over years until they become part of who your family is. Sunday dinners, birthday traditions, the way you close the day, the thing you always say before someone leaves the house. This section helps you see those patterns clearly so they can continue without you.

Discovery Prompts

Take your time with these. Write as much or as little as comes naturally. You can always return to expand your answers later.

1. What is one tradition or ritual your family associates with you? How did it start?

2. What is the smallest daily or weekly habit you share with someone you love?

3. If your family were to keep one tradition alive in your memory, which one would you choose?

4. Is there a tradition from your childhood that you carried forward? What makes it worth keeping?

5. What new tradition would you like to start that your family could continue?

Action Checklist

Check each item as you complete it, or mark the ones you want to prioritize this month.

- Write down one tradition with enough detail that someone else could lead it
- Teach a recipe, skill, or practice to a family member while I still can
- Record a video of a tradition in progress (cooking, holiday preparation, a gathering)
- Ask my family which of our traditions matter most to them
- Create or revive one small ritual I want to be remembered for
- Write a note explaining why a particular tradition matters to me

***Tip:** Traditions survive when someone understands the why, not just the what. Tell your family the story behind the tradition and it becomes something they protect, not just something they repeat.*

The Legacy of Your Clarity

Reducing the Burden on the People You Love

Grief is heavy enough without the added weight of confusion, guesswork, and scrambling for information. One of the most practical gifts you can leave your family is clarity: organized documents, clear instructions, and honest communication about what exists, where to find it, and what to do with it. This section focuses on the practical side of legacy that most people delay until it becomes urgent.

Discovery Prompts

Take your time with these. Write as much or as little as comes naturally. You can always return to expand your answers later.

1. If something happened to you tomorrow, what would your family struggle to find or figure out?

2. Who in your life needs to know about your financial accounts, insurance policies, or legal documents?

3. Have you clearly communicated your funeral or memorial preferences? What are they?

4. Are there digital accounts, subscriptions, or files your family would need access to?

5. What is one thing you could organize this week that would save your family significant stress later?

Action Checklist

Check each item as you complete it, or mark the ones you want to prioritize this month.

- Create a list of all financial accounts, insurance policies, and contact information in one secure location
- Verify that my life insurance beneficiaries are current and correct
- Document my digital accounts and how my family can access or close them
- Write a letter of instruction covering practical matters my will does not address
- Tell at least one trusted person where to find my important documents
- Review or create a healthcare directive and power of attorney

***Tip:** The goal is not perfection. A handwritten list in an envelope your family knows about is infinitely more valuable than a digital system they cannot find.*

Who Needs What

Matching Your Legacy to the People Who Need It

Not everyone in your family needs the same thing from you. Your adult daughter may need your clarity and truth. Your grandson may need your history and voice. This exercise helps you think about each person individually so your efforts land where they matter most.

Write each family member's name in the left column. Then mark the legacy types that matter most for that person. Use a check, a star, or any mark that works for you.

Family Member	Voice	Wisdom	Truth	History	Presence	Clarity

Reflection

Looking at this map, which person has the most marks? What does that tell you about where to focus first?

Is there a legacy type that appears for nearly everyone? If so, that is likely your most important priority.

Tip: *This map is a compass, not a contract. Use it to guide your next steps, not to overwhelm yourself with obligations. One meaningful action for one person is better than incomplete plans for everyone.*

Your Legacy Action Plan

Pulling It All Together

You have explored six types of legacy and mapped them to the people who matter most. Now distill everything into action. Review your notes, your checklists, and your family mapping. Then fill in the priorities below.

Focus on what you can do this week, this month, and this year. Legacy is not built in a single sitting. It is built in small, consistent acts of intention.

This Week

What is the single most important action you can take in the next seven days?

My first step:

Who is this for? _____

Legacy type (Voice / Wisdom / Truth / History / Presence / Clarity):

This Month

What three actions will you commit to completing in the next 30 days?

1. Action:

Who is this for? _____

2. Action:

Who is this for? _____

3. Action:

Who is this for? _____

This Year

What larger legacy projects do you want to complete in the next 12 months?

Project 1:

Project 2:

Project 3:

Who Can Help

Legacy building does not have to be a solo project. Identify the people, tools, or resources that can support you.

A family member who could help me record or organize:

A professional who could guide me (counselor, attorney, advisor):

A tool or resource I want to explore:

Tip: *The best legacy plan is the one you actually start. Do not wait for the perfect moment, the perfect words, or the perfect format. Your family does not need perfection. They need you.*

Access the Complete Online Guide

This workbook is the companion to a comprehensive guide covering everything from voice recordings and ethical wills to family story preservation and practical end-of-life organization. Scan the code below to read the full article with additional resources, links, and tools.



Read the Full Guide

memorialmerits.com/how-to-leave-a-legacy-beyond-money



Explore the Legacy Journals

memorialmerits.com/books

M E M O R I A L M E R I T S

Sanctuary, not sales floor.

Your family does not need your money. They need your story.