LEGACY ALLIANCE SOLUTIONS

Asset Protection Check-In

A simple worksheet to help you identify what you have, what is already protecting it, and where you may want more information or support.

WHERE ARE YOU?	WHERE DO YOU WANT TO BE?	WHAT'S MISSING?	WHAT RESOURCES CAN HELP?	WHAT'S THE PLAN?

1. WHAT DO YOU HAVE?

Check the items that are part of your current financial picture.

■ Checking account
■ Emergency savings
■ Vehicle(s)
■ Investments
■ Valuable personal property
■ Savings account
■ Home or other real estate
■ Retirement account (401(k), 403(b), IRA, etc.)
■ Business or business ownership
■ Other assets

If something happened to you tomorrow, would someone you trust know what you own and where to find the information?

■ Yes
■ No
■ Some of it
■ I'm not sure

2. WHAT DO YOU ALREADY HAVE PROTECTING IT?

Check anything you currently have in place.

■ Life insurance
■ Homeowners or renters insurance
■ Emergency fund
■ Trust
■ Retirement plan
■ Health insurance
■ Auto insurance
■ Will
■ Beneficiaries listed on applicable accounts/policies
■ Other protection or planning resource

3. DO YOU UNDERSTAND WHAT YOU HAVE?

■ I know what my insurance policies cover.
■ I have reviewed my coverage recently.
■ I know who my current beneficiaries are.
■ My family knows where important financial information is located.

What on this page made you think, “I need to look into that”?

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Turn the Check-In Into a Plan

Use the Legacy Alliance framework to decide what deserves your attention next.

WHERE ARE YOU?

What do you currently own, earn, save, insure, or already have in place?

WHERE DO YOU WANT TO BE?

What are you trying to protect, improve, or build for yourself or your family?

WHAT'S MISSING?

What gaps, unanswered questions, or areas need more attention?

WHAT RESOURCES CAN HELP?

What would you like to learn more about?

- ■ Life insurance
- ■ Health insurance
- ■ Budgeting
- ■ Saving
- ■ Investment education
- ■ Wills & trusts
- ■ Organizing financial information
- ■ Increasing income / work-from-home opportunities
- ■ I'm not sure - I need help identifying my next step

WHAT'S THE PLAN?

Choose one next step. You do not have to solve everything today.

My next step is:

I plan to take this step by: ____

Your legacy starts with understanding where you are today.
Identify what you have. Understand what is protecting it. Find the gaps. Then choose the resources that can help you move forward.

Educational use only. This worksheet does not provide legal, tax, insurance, or individualized investment advice. Coverage and planning needs vary by person.