



Family Financial Map

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Use this worksheet to create a map of your family, looking up, down and perhaps sideways in your family, to identify those who are most important to you or dependent on you.

Planning a thoughtful and effective transfer of family wealth can be challenging. The first step is to fully consider who you may need, or want, to provide for in your legacy plans. Use this worksheet to help map out your immediate and extended family members so you will have a clear picture of who you and your advisors may want to plan for. Planning wealth transfer can give you peace of mind because it helps your loved ones avoid common and costly mistakes.

Sample family financial map

PARENTS

John's
parents' names + ages

PARENTS

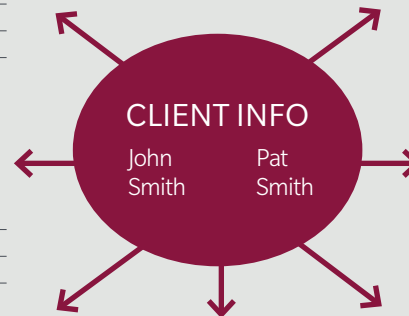
Pat's
parents' names + ages

OTHER

John's other
family members + ages

OTHER

Pat's other
family members + ages



CHILDREN

John's children
from previous
relationships + ages

John and Pat's
children + ages

Pat's children
from previous
relationships + ages

This example is for illustrative purposes only.

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This material should be used as helpful hints only. Each person's situation is different. You should consult your investment professional or other relevant professional before making any decisions.

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Family Financial Map

Family financial map worksheet

<p>PARENTS</p> <p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p>	<p>CLIENT INFO Names</p> <p>_____</p> <p>_____</p>	<p>PARENTS</p> <p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p>	<p>OTHER <i>(i.e., nieces, nephews, etc.)</i></p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>OTHER <i>(i.e., nieces, nephews, etc.)</i></p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>CHILDREN</p> <p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>PARENTS</p> <p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p>	<p>OTHER <i>(i.e., nieces, nephews, etc.)</i></p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>Names _____</p> <p>Ages _____</p> <p>_____</p> <p>_____</p> <p>_____</p>

Your information

Date completed: _____

Special needs: _____

Notes:

Family member emergency contact

Name: _____

Address: _____

Phone: _____

Email: _____

Contact your financial advisor or other investment professional for more information or visit mfs.com.