



THE LEGACY VAULT™ BY MY LIFE & WISHES®

One-Page Family Clarity Worksheet

A simple exercise for the people you love.

1

Your People

Who would be most impacted if something unexpected happened to you?

NAME

RELATIONSHIP / ROLE IN YOUR LIFE

1.		
2.		
3.		
4.		

2

What They Would Need

Check all that apply — then add a note on where to start.

☐ Who to contact first 	☐ Healthcare wishes
☐ Where documents are located 	☐ Digital life guidance
☐ Trusted advisors 	☐ Personal messages or instructions

3

One Thing You'd Want Them to Know

What is the single most important thing your family should know?

4

A Message from the Heart

If your family read one sentence from you, what would it say?

“

FINAL THOUGHT

Estate documents handle assets. Clarity handles emotions. Both matter.

This worksheet is a starting point — organization and access are the next step.