



# The legacy protection *checklist.*

See the gaps. Start the conversation.

A practical starting point for the family, assets, and future you want to protect. Use these questions to organize what you know and identify what needs a closer look.

## HOW TO USE THIS GUIDE

Check each item you have reviewed. Leave uncertain items unchecked and bring them to your conversation with Bajis. This is a reflection tool, not a score or a complete planning assessment.

Prepared for: \_\_\_\_\_

Date: \_\_\_\_\_

# Start with what you have.

A few thoughtful questions can reveal where to begin.

## 01 Family & estate structure

- ☐ I know where my current estate documents are kept and who can access them.
- ☐ I have reviewed who is named to act on my behalf and care for my dependents.
- ☐ I have checked whether my beneficiaries and documents reflect my current wishes.

## 02 Insurance & income continuity

- ☐ I have listed my existing life insurance and the people or obligations it is intended to support.
- ☐ I have considered how a loss of income could affect my household and mortgage.
- ☐ I know which coverage questions to review after a major life change.

## 03 Business & asset exposure

- ☐ I have identified my home, business, and other assets that may need a coverage review.
- ☐ I have considered who could keep essential responsibilities moving if I were unavailable.
- ☐ I have noted questions about liability, ownership, or coverage to discuss with the right professional.

# Give your next step a purpose.

## 04 Long-term intentions

- ☐ I have written down what I want my assets and savings to make possible.
- ☐ I have considered whether retirement, insurance, and estate plans support those intentions.
- ☐ I have identified recent life changes that may call for an update.

## Three questions I want to ask

01 \_\_\_\_\_

02 \_\_\_\_\_

03 \_\_\_\_\_

## What matters most to me

\_\_\_\_\_

\_\_\_\_\_

You don't need every answer to begin.

Book a free 30-minute conversation with Bajis.

[Start your conversation →](#)

For education and conversation preparation. Legal, tax, and financial decisions should be reviewed with appropriately qualified professionals.