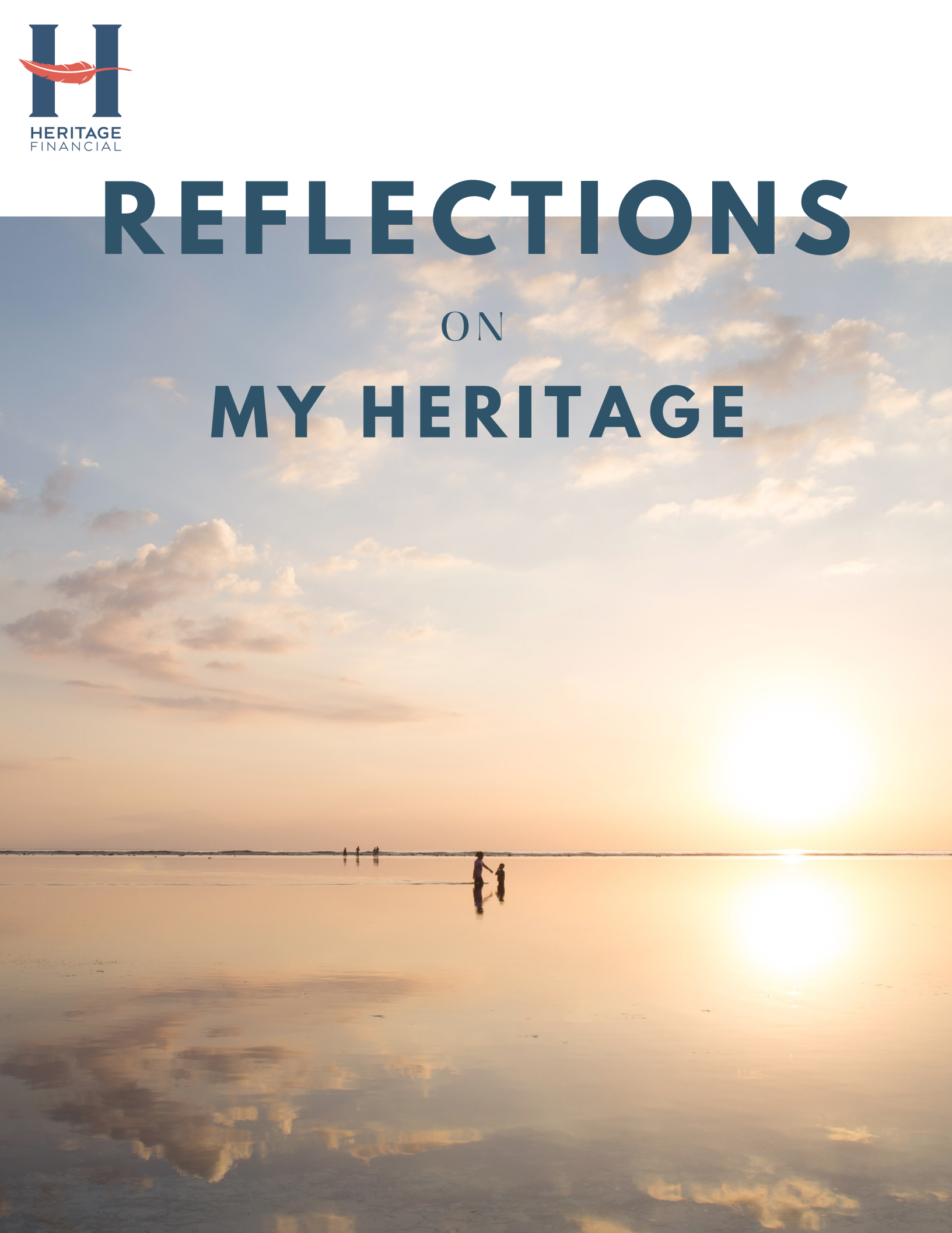


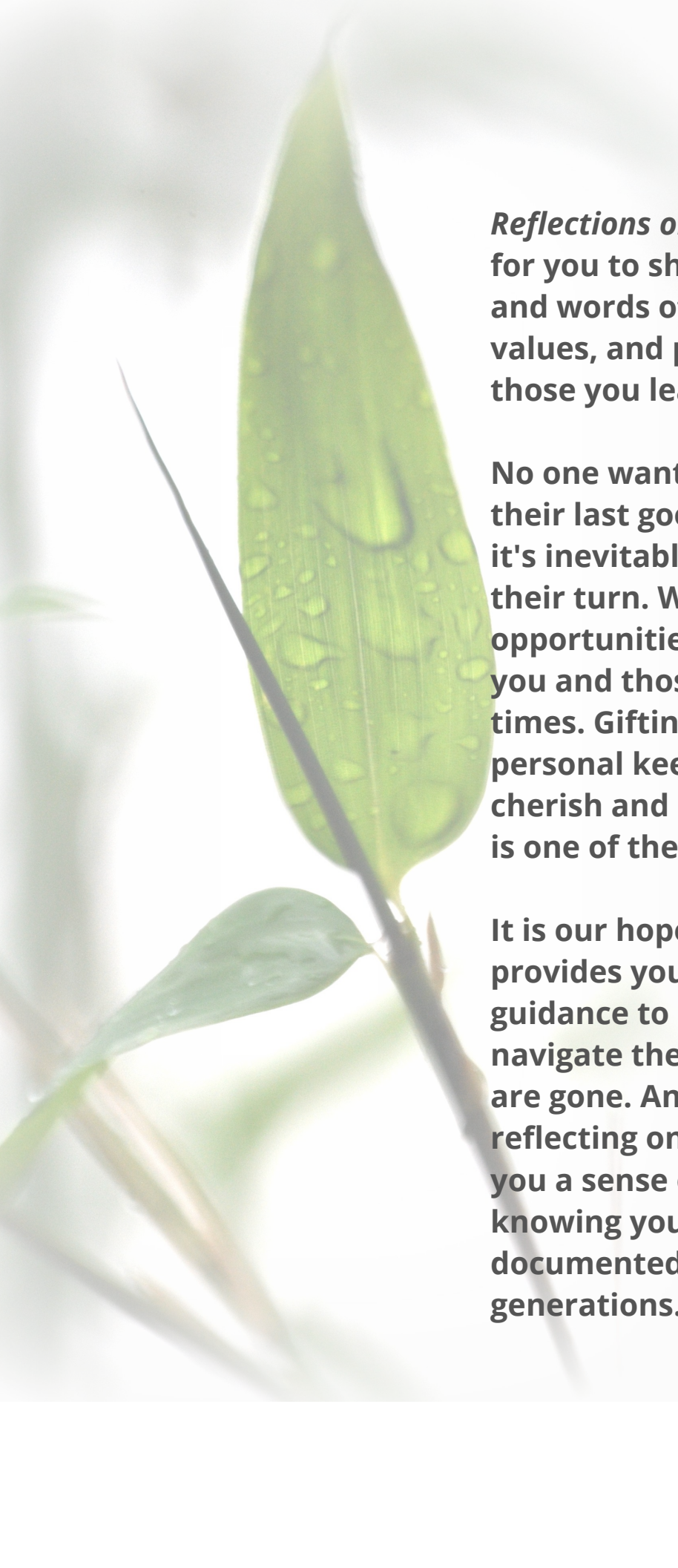


REFLECTIONS

ON

MY HERITAGE



A close-up photograph of a green bamboo leaf with several water droplets resting on its surface. The leaf is positioned diagonally across the frame, with its base at the bottom left and its tip pointing towards the top right. The background is a soft, out-of-focus light green, suggesting a natural setting. The lighting is bright, highlighting the texture of the leaf and the clarity of the water droplets.

***Reflections on My Heritage* is a resource for you to share treasured memories and words of wisdom, pass along values, and provide inspiration to those you leave behind.**

No one wants to think about saying their last goodbye to a loved one, but it's inevitable that everyone will get their turn. We believe there are opportunities to find some peace for you and those you love during trying times. Gifting your loved ones a personal keepsake that they can cherish and revisit time and time again is one of them.

It is our hope that this parting gift provides your loved one's with guidance to help them successfully navigate the grieving process after you are gone. And we hope the time spent reflecting on your heritage will bring you a sense of peace and solace knowing your thoughts and wishes are documented to be shared with future generations.

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End of life celebration wishes.

FAMILY HISTORY

Treasured memories, stories, and traditions throughout the years.

Sketch your family tree. Add additional members as appropriate.

Grandfather	Grandmother	Grandfather	Grandmother
Mother		Father	
Me			

FAMILY HISTORY

Treasured memories, stories, and traditions throughout the years.

I was born in _____ **on** _____ , _____

Facts about our family history.

Extraordinary family members and their accomplishments.

FAMILY HISTORY

Treasured memories, stories, and traditions throughout the years.

Childhood

What did you dream of being when you were child?

Where did you grow up? What was your childhood like?

What were the dynamics of your childhood home like?

Share some of your fondest childhood memories.

FAMILY HISTORY

Treasured memories, stories, and traditions throughout the years.

Adulthood

Describe your family heritage.

Share some of your fondest memories as an adult.

Share your special interests, collections, and hobbies.

What notable events did you live through? How did they impact you?

FAMILY HISTORY

Treasured memories, stories, and traditions throughout the years.

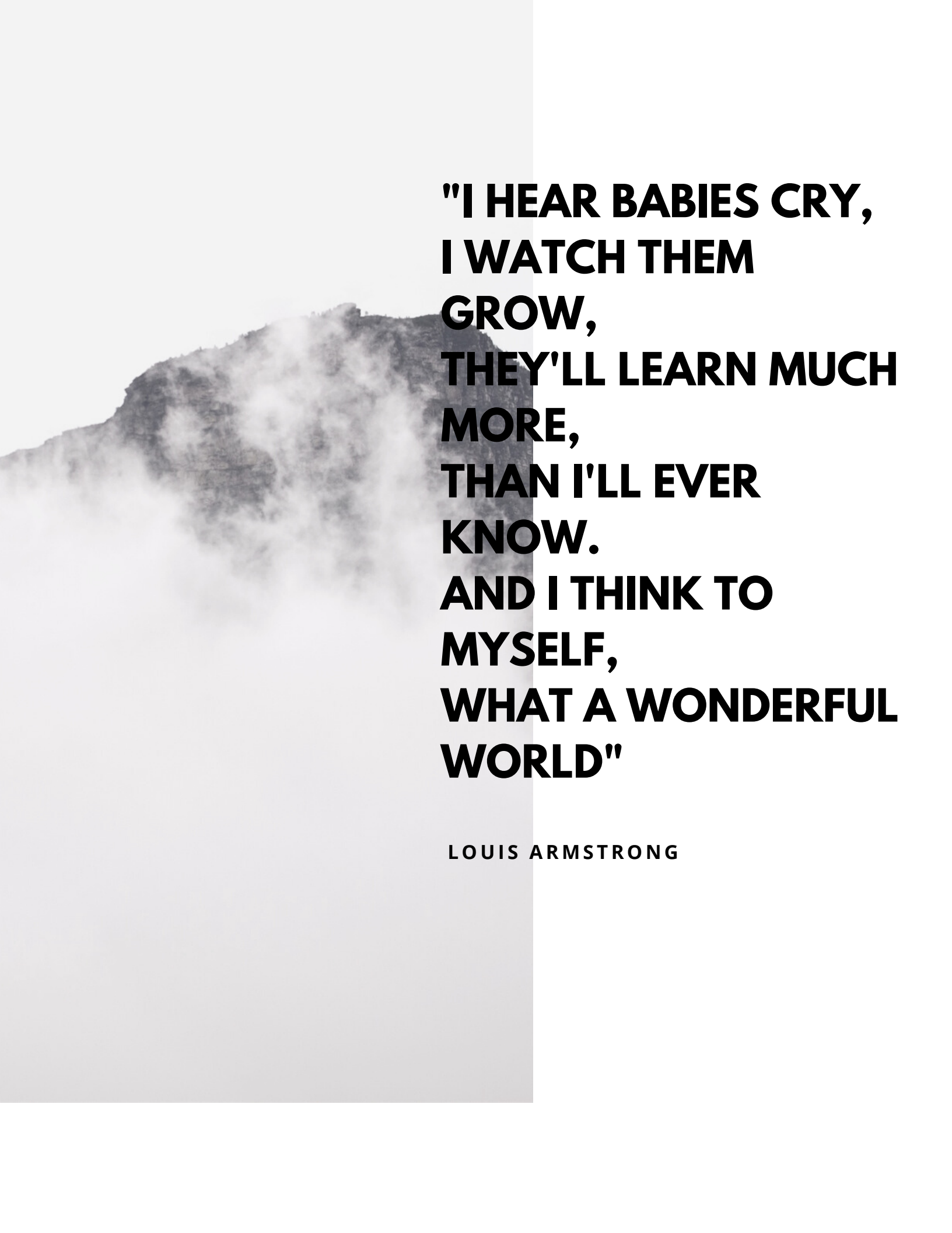
Adulthood

What was one of your toughest struggles, and what did you learn from it?

Share lessons learned that you'd like to pass along.

Favorite family recipes include...

What family traditions do you hope continue for generations?



**"I HEAR BABIES CRY,
I WATCH THEM
GROW,
THEY'LL LEARN MUCH
MORE,
THAN I'LL EVER
KNOW.
AND I THINK TO
MYSELF,
WHAT A WONDERFUL
WORLD"**

LOUIS ARMSTRONG

RELATIONSHIPS

Friendships, love, and lessons learned.

Share stories of friendships throughout the years.

Share love lessons learned.



**“I’VE LEARNED THAT
PEOPLE WILL FORGET
WHAT YOU SAID,
PEOPLE WILL FORGET
WHAT YOU DID, BUT
PEOPLE WILL NEVER
FORGET HOW YOU
MADE THEM FEEL.”**

MAYA ANGELOU

VALUES

Values and the legacy you wish to leave to future generations.

What values do you want to pass down to future generations?

What makes these values so important to you? (e.g., is there a story behind them?)

I want to be remembered for...

I believe the most important things in life are...

I am really proud of...

TRUSTED ADVISORS

Names and contact information of those trusted to help manage your financial affairs and whom successors can reach out to for direction.

ACCOUNTANT

Name

Firm

Email address

Phone number

ATTORNEY

Name

Firm

Email address

Phone number

FINANCIAL PLANNER

Name

Firm

Email address

Phone number

LIFE INSURANCE AGENT

Name

Firm

Email address

Phone number

PROPERTY & CASUALTY INSURANCE AGENT

Name

Firm

Email address

Phone number

OTHER

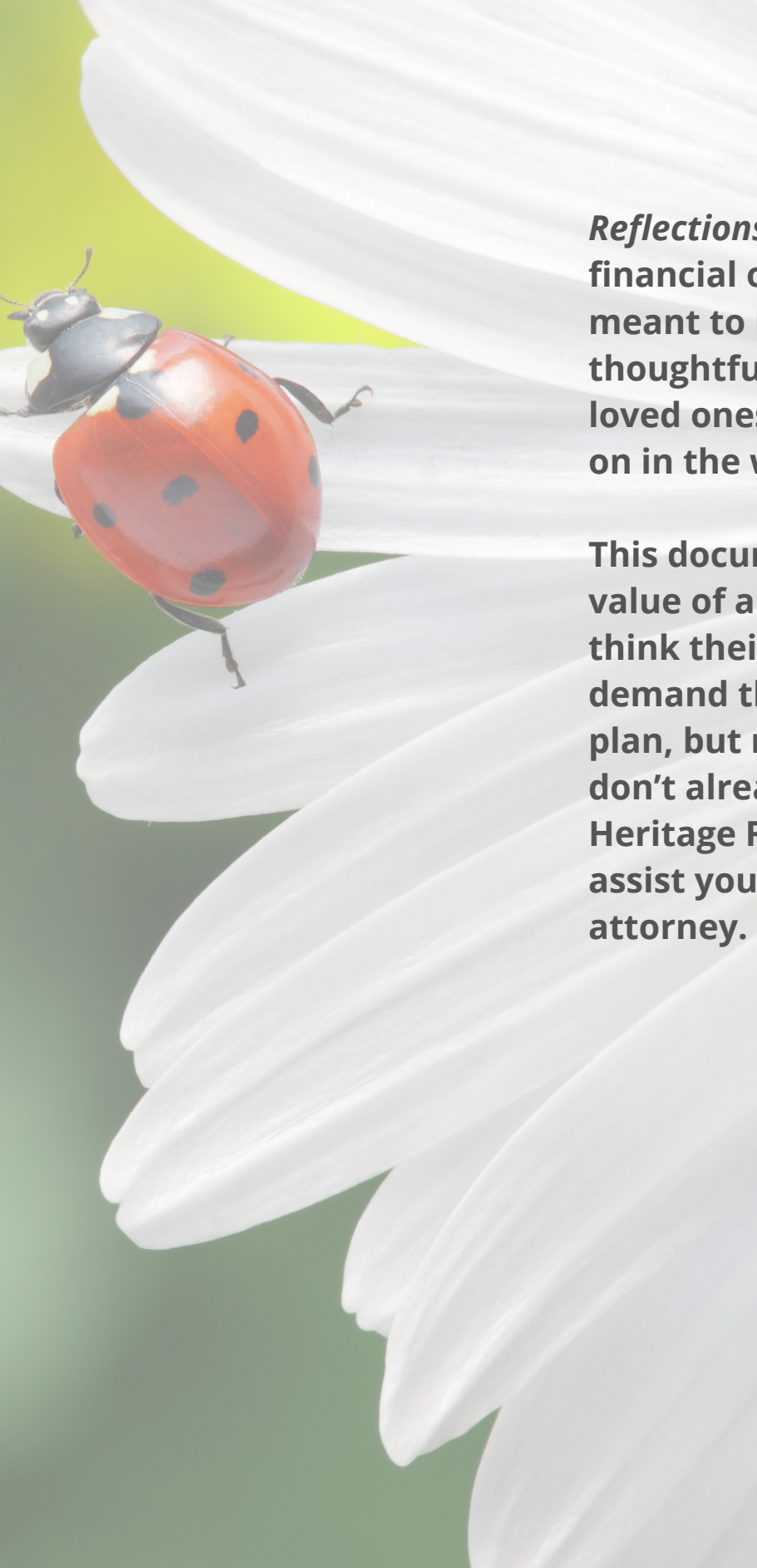
Name

Firm

Email address

Phone number

It is important to inform your family of where your important documents, passwords and other items are located. Having this discussion during life will make the end of life transition easier on those left behind.



Reflections on My Heritage is not a financial or legal document. Instead, it is meant to be a resource that provides thoughtful support to help guide your loved ones and allow your legacy to live on in the way you wish.

This document does not replace the value of an estate plan. Some clients think their estate isn't large enough to demand the need for a formal estate plan, but many are misinformed. If you don't already have a plan in place, Heritage Financial would be happy to assist you in finding a trusted estate attorney.

LAST WISHES

My end of life celebration wishes.

Upon my passing please notify (e.g., religious organization, charities, fraternal groups, member organizations).

The vision I have for my end of celebration includes (e.g., music, poetry, bible verses, flowers, burial direction).

The legacy I wish to leave behind is...

MY FINAL REFLECTIONS



A photograph of a woman standing in a field of wheat, with the wheat in the foreground being in sharp focus and the woman in the background being blurred. The scene is bathed in warm, golden light, suggesting a sunset or sunrise. The woman is wearing a light-colored, sleeveless dress and is looking towards the right side of the frame.

THE HERITAGE OF THE PAST IS THE SEED THAT BRINGS FORTH THE HARVEST OF THE FUTURE

WENDELL PHILLIPS

Financial Planning . Wealth Management Retirement Planning . Estate Planning



Heritage Financial Services is an independent financial advisory firm that works closely with affluent families by coordinating and managing all aspects of their wealth, retirement and financial security.

Heritage provides highly personalized solutions with the credibility and sophistication of expert financial advice and investment management. We work as a team to build lifelong relationships with our clients and their other trusted advisors to help simplify, organize and instill confidence in their often-complex financial lives.

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