

Managing Expectations

Inheritance Planning Worksheet

Sometimes the toughest part of managing an inheritance is the expectations of the other people in your life. This may be a vulnerable time, especially when it comes to the expectations of family members and others. It is a good idea to put off making commitments to others until you've had time to absorb the shock of your loss and gotten a better understanding of what you have, what you need and what you desire going forward.

Step One: Make a list of who expects or wants what, when they want it, how much it will cost and how you feel about their expectations.

Expectations and Wants of Others

Who	What	When	Cost	How I Feel

Step Two: Communicate with all persons to let them know what they should and should not expect. Remember the timing, the amount and whether or not you will be giving them anything at all is your decision. If you do intend to meet an expectation, be sure to give yourself and the person a reasonable timeline. It is always good to give yourself more time than you think it will take.

Who to communicate with

This material was created for educational and informational purposes only and is not intended as ERISA, tax, legal or investment advice. The advisor is providing educational services only and is not able to provide participants with investment advice specific to their particular needs. If you are seeking investment advice specific to your needs, such advice services must be obtained on your own separate from this educational material.

Worksite Financial Solutions is a program exclusive to LPL Financial and its advisor partners.

Securities offered through LPL Financial.

Member FINRA/SIPC.

Tracking #1-289598
RP-0077-0714