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Anything, Just Not Everything

Inheritance Planning Worksheet

Your inheritance may mean you can do anything you want, just not everything you want. The question to ask yourself is what is most important to me now and in the future. A good way to answer this question is to start by making a list of everything you would like to do with this money.

Step One: Write everything down that comes to mind, even if it seems far-fetched. If there is someone else who will share in your inheritance, have them do the same.

Step Two: Once the list is made, ask yourself if you could do any two things on the list, what would they be? Put a number one and a two in front of these two most important items. Next ask yourself the same question again, if you could do two more things on the list what they would be. Place a three and a four in front of these items.

You may feel you could do even more things on the list, but stop for a while and think about how you could get these top three of four items done. Put your resources toward getting the most important things done first and then go back to the list as you prioritize the remaining items using the same set of questions. But before you start to put your plan into action wait a week and repeat the exercise.

#	What Do I Want to Do?	By When?	How Much Will It Cost?

(continued)

Step Three: Wait a week and repeat the exercise one more time. See if your list changes or if the priorities have changed. It is not unusual for your list to change. This is simply the process of giving yourself time to really think through what the inheritance means to you and what you really want to do with the money. Most people will find their thinking changes over time.

If the changes seem significant, then wait two weeks and repeat the exercise.

#	What Do I Want to Do?	By When?	How Much Will It Cost?

Step Four: List the top four things you want to do and include why each one is important now and in the future.

Top Four	Why Important Now	Why Important Future
1.		
2.		
3.		
4.		

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