

LIVE WEBINAR



LEGACY PLANNING SERIES PART 1

LAYING THE GROUNDWORK — THE ESSENTIALS OF LEGACY PLANNING

Hosted By:

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LEGACY PLANNING SERIES - PART ONE

Laying the Groundwork — The Essentials of Legacy Planning

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Today's Focus



- Introduction
- Online Accounts & Access
- Social Security Information
- Employee & Workplace Benefits
- Legal & Vital Documents



Introduction and Background



Francis Financial

- Nationally recognized wealth management firm based in NYC
- Women owned and operated
- Specializing in guiding widows, divorcees, and women in transition
- Over 20 years of experience helping clients achieve clarity, confidence, and control over their finances
- Holistic financial planning: investments, retirement, tax, estate, and legacy planning
- Dedicated team of Certified Financial Planners™ and Certified Divorce/Certified Grief Financial Analysts
- Known for our compassionate, educational approach during life's most challenging times
- Committed to empowering women to make informed, values-based financial decisions

Savvy Ladies®

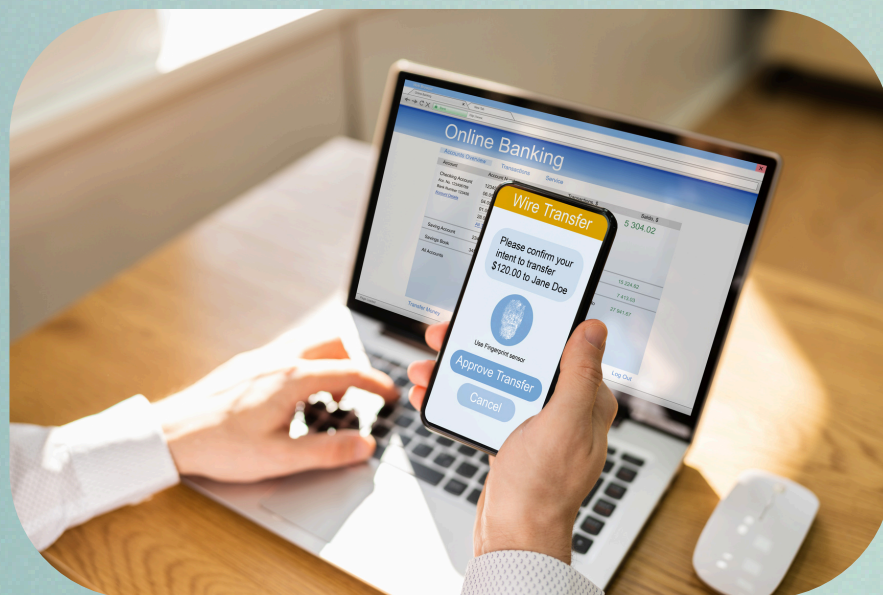
- Founded by our CEO, Stacy Francis, to provide free financial education and guidance to women in crisis or transition
- Has helped over 25,000 women gain confidence through workshops, webinars, and a free 1:1 financial helpline



1. Online Accounts & Access

- Bank, investment, and utility accounts
- Email and social media logins
- Device information (phone, tablet, laptop)
- Password manager and 2FA codes

\$80 billion in unclaimed assets held by states (NAUPA, 2023)



2. Social Security Information

- Social Security Number
- Benefits statement (print from SSA.gov annually)



Why It's Important:

Social Security often makes up a large part of retirement income. Accurate info ensures survivors can claim promptly. Survivors may be entitled to up to 100% of a spouse's benefit.

3. Employee & Workplace Benefits

- HR contact info
- Description of benefits (life insurance, pensions, 401(k))
- Copies of benefit statements
- Confirm beneficiaries are up to date
- Forgotten benefits = lost wealth



4. Legal & Vital Documents

- Will
- Power of Attorney
- Healthcare Proxy or Advance Directive
- Living Will
- Marriage, birth, and death certificates
- Property deeds and vehicle titles



67% of Americans lack an estate plan (Caring.com, 2024)

Probate averages 16 months and costs 2–7% of estate value

Next Steps & Resources

- Download the Legacy Planning Checklist
- Complete Sections 1-4
 - Identify what's missing
 - Set a review date each year



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