



ESTATE E-WORKBOOK

CREATE YOUR *ESTATE PLAN*

Family Legacy: Uncovering
Your Past to Cover Your Future

WELCOME

The time is now for you to create your financial future and have your legacy set. Following this challenge will allow you to create your plan.

Your family and future will THANK YOU!
Each day you will be given things you need to do and get your life in order.



MEET THE FINANCIAL LADY

Welcome to The Financial Lady Bridgett Springer LLC, The Home Of Financial Transformation!

Here, we are committed to helping you start a chain of generational wealth but with You First! With exemplary leadership, we teach, inspire, and mentor you on saving, organizing, and building generational wealth. Being financially stable is not enough; we want you to be Financially Free by taking bold steps.

Without holding back, our goal is to empower you with financial killer shots that will help you maximize opportunities and take the huge financial leap to be financially independent. WELCOME TO THE NEW LIFE!

WHAT IS YOUR **ESTATE?**

What assets are considered part of an estate:

1. Bank Account
2. Retirement account investment accounts
3. Jewelry
4. Household furnishings vehicles
5. A business
6. Computer
7. Real estate
8. Life insurance - outside of work

**BE AWARE
BE INFORMED**





WEALTH WARRIOR FINANCIAL KNOWLEDGE QUIZ

**This is what
your 10 day
challenge is
all about!**

SCORING

Give yourself 1 point for every time you answer “Yes” and 0 for every time you answer “No.”

13 to 15 points: Excellent! You have a good grasp of where money is.

9 to 13 points: You’re not totally in the dark, but there are some areas where your knowledge could be improved.

Under 9 points: Your will be hurt financially because of insufficient knowledge. It would help to learn how to protect yourself from future financial disasters.

YES NO

I know the current value of my homes, including the size of the mortgage and the amount of equity I’ve built.

I know the length of the mortgage - payment schedule and how much extra it would cost each month to pay down the mortgage in half the time.

I know how much life insurance I have outside of my job for my spouse and me, if applicable. I know how much cash value there is in the policy.

I know the details, such as the amount of coverage, and monthly or yearly payment of all insurance policies carried by myself and my spouse, if applicable.

I have reviewed my life insurance policy in the past 12-24 months to see the price and when it will expire.

I have a Will, Medical Power of Attorney, and Financial POA?

I have attempted to protect my family ‘s nest egg from lawsuits by carrying and “umbrella” insurance policy that includes liability coverage.

I either prepared my own tax return this year or reviewed my tax situation with the person who prepared my return.

I know the location and amount of all my or my family's investments, including:

- Cash in savings or money-market accounts
 - CD or savings bonds
 - Stock and bonds
 - Mutual funds
 - 529 college savings plans or IUL plan
 - Real estate investments (deeds,mortgages, and rental agreements, etc
-

If I or my family own a business, I know the current valuation of the business, including how much debt it currently carried and the value of the liquid assets.

If applicable, I know the value, location, and performance of all my retirement accounts and my spouse's. Including IRAs, SEP, Solo 401k, and company pension

I have a beneficiary and an authorized signer on my bank account (s)

I know how much I'm putting away for retirement and where it's being invested.

I know how much money I (and my spouse, if applicable will be getting from Social Security.

I know how much life insurance my husband or children will receive when I die, and it will be enough to replace my income. If single, I have insurance outside of work to cover funeral/ other expenses when I die.

CHALLENGE

DAY ONE

Write down your action plan &
Which items you need to get

Clear, written goals have a wonderful effect on your thinking. They motivate you and galvanize you into action. They stimulate your creativity, release your energy, and help you to overcome procrastination as much as any other factor.

Brian Tracy

CHALLENGE

DAY TWO

Complete last will & testament
Questionnaire

NOTES

All you need is the plan,
the road map, and the
courage to press on to
your destination.

Earl Nightingale

CHALLENGE

DAY THREE

Break time!

Write down your feelings about planning your estate

How do you feel?

Write what you are thinking:

Read these
affirmation 3x:

I can overcome every obstacle that comes my way.
I believe in my abilities.
I have everything I need for success.
I am stronger than my fears.
I can face every challenge.

CHALLENGE

DAY FOUR

Create Your action plan
for Days 4 -10

People with goals
succeed because
they know where
they're going.

Earl Nightingale

Use the checklist to keep you on track. Once you have accomplished your goals, check them off. Day 10, you should have everything done!

CHECKLIST

Last Will Testament

Medical Power of Attorney

Financial Power of Attorney

Purchase a binder to keep all essential documents

Schedule time with The Financial Lady

Gather all documents to put in the folder

Create emergency contact list

Find location where your Lifefolio will be kept

Talk to your family about your "Lifefolio"

Add Beneficiary & Signer to bank account (s)

Have your life insurance reviewed by The Financial Lady

Treat yourself for accomplishing your goals!

CHALLENGE

DAY FOUR

It's Schedule time!

Schedule time to book appointments to get things done on your checklist. Write down the date, time, and what you're getting done on this sheet. Add to your calendar of choice to get notifications of upcoming commitments!

NOTES

Planning is bringing the future into the present so that you can do something about it now.

Alan Lakein, author

RESOURCES

NEXT STEPS

Schedule time with Bridgett the financial lady!



I will create a customized financial plan for you! Please write down date and time, below :

Book Time With Me

What you want to discuss at our meeting?

CHALLENGE

TEN DAYS

Challenge overview

DAY 1

Create action plan & write down which items you need

DAY 2

Complete last will & testament
Questionnaire

DAY 3

Write down how you are feeling about planning your estate. This is a challenging process.

DAY 4

Create Your action plan for Days 4 -10

DAY 5

Review the checklist and mark your accomplishments!

DAY 6

Ask for help if you don't have anything done! call, text or email the financial lady;

DAY 7

Review the checklist and mark your accomplishments!

DAY 8

Working hard to finish the race!

DAY 9

Working hard to finish the race!

DAY 10

Treat yourself! You do it

HOW TO GET IN TOUCH

HOW WE CAN COMMUNICATE

Office Phone: 346-571-5527
Business # call/text 832 - 752-4201
Website: thefinanciallady.com
Email: bridgett@thefinanciallady.com

Book Time With Me

FOLLOW ME

Facebook: [thefinanciallady](https://www.facebook.com/thefinanciallady)
Instagram: [_thefinanciallady](https://www.instagram.com/_thefinanciallady)

