MFS ADVISOR EDGE®

MFS HERITAGE PLANNING® > FINANCIAL BASICS

Family Financial Map

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To customize, type “Courtesy of:” and then your name, firm, and contact information; and include the following:

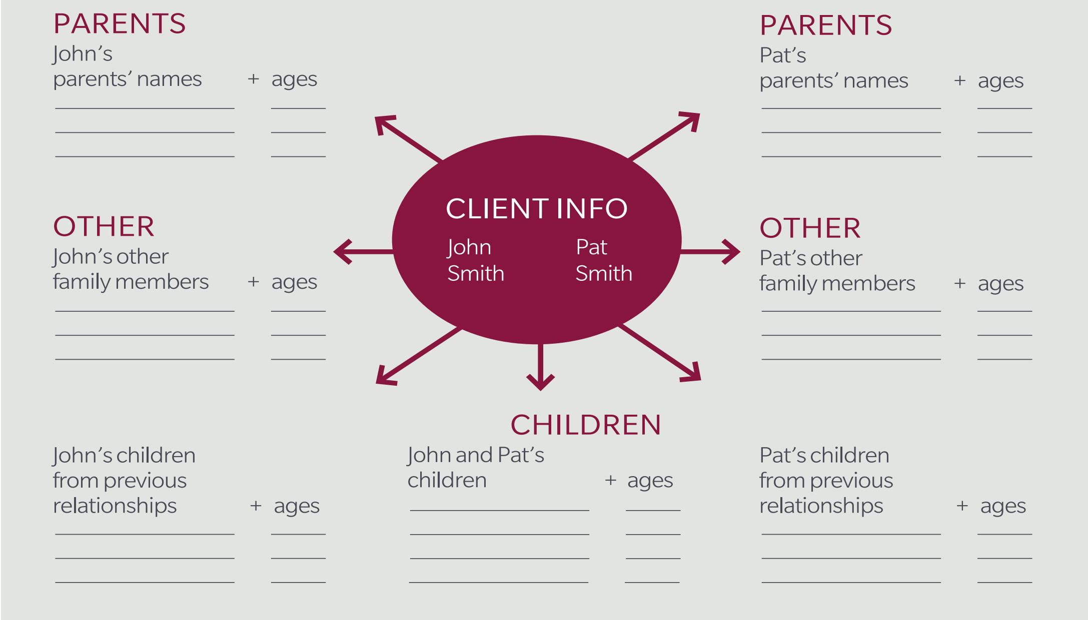
"Neither MFS nor any of its subsidiaries is affiliated with [Insert Name of Company]."

If you do not wish to customize this sheet, highlight this text and delete.

Use this worksheet to create a map of your family, looking up, down and perhaps sideways in your family, to identify those who are most important to you or dependent on you.

Planning a thoughtful and effective transfer of family wealth can be challenging. The first step is to fully consider who you may need, or want, to provide for in your legacy plans. Use this worksheet to help map out your immediate and extended family members so you will have a clear picture of who you and your advisors may want to plan for. Planning wealth transfer can give you peace of mind because it helps your loved ones avoid common and costly mistakes.

Sample family financial map



This example is for illustrative purposes only.

continued on page 2

This material should be used as helpful hints only. Each person's situation is different. You should consult your investment professional or other relevant professional before making any decisions.

Family financial map worksheet

PARENTS

Names | Ages

PARENTS

Names | Ages

CLIENT INFO

Names

OTHER

(*i.e.*, nieces, nephews, etc.) | Ages

OTHER

(*i.e.*, nieces, nephews, etc.) | Ages

CHILDREN

Names | Ages

Names | Ages

Names | Ages

Your information

Date completed:

Special needs:

Family member emergency contact

Name:

Address:

Phone:

Email:

Notes:

Contact your financial advisor or other investment professional for more information or visit mfs.com.