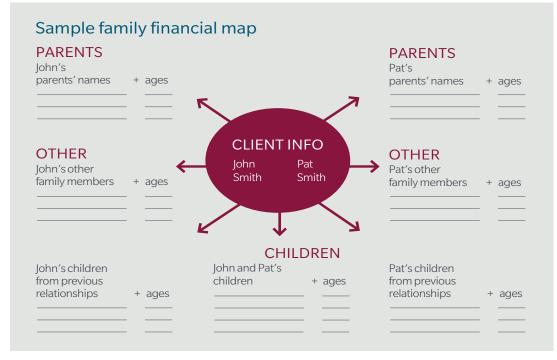


MFS HERITAGE PLANNING® > FINANCIAL BASICS



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.





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.

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Family Financial Map

Family financial map worksheet

PARENTS Names	Ages					PARENTS Names	Ages
OTHER (i.e., nieces, nephews, etc.)	Ages •		CLIEN1 Nam		*	OTHER (i.e., nieces, nephews, etc.)	Ages
Names	Ages	Names	CHILL	DREN	Ages	Names	Ages
Your information				Family	member e	emergency contact	
Date completed:				Name:			
Special needs:				Address:			
				Phone:			
				Email:			

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

Notes: