



Family Financial Map

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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

PARENTS

John's
parents' names + ages

_____	_____
_____	_____

PARENTS

Pat's
parents' names + ages

_____	_____
_____	_____

OTHER

John's other
family members + ages

_____	_____
_____	_____

OTHER

Pat's other
family members + ages

_____	_____
_____	_____

CLIENT INFO

John Smith Pat Smith

CHILDREN

John's children
from previous
relationships + ages

_____	_____
_____	_____

John and Pat's
children + ages

_____	_____
_____	_____

Pat's children
from previous
relationships + ages

_____	_____
_____	_____

This example is for illustrative purposes only.

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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 _____ _____ _____ _____		OTHER (i.e., nieces, nephews, etc.) _____ Ages _____ _____ _____ _____	
		CHILDREN Names _____ Ages _____ _____ _____ _____ _____	
Names _____ Ages _____ _____ _____ _____		Names _____ Ages _____ _____ _____ _____	

Your information

Date completed: _____

Special needs: _____

Notes:

Family member emergency contact

Name: _____

Address: _____

Phone: _____

Email: _____

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