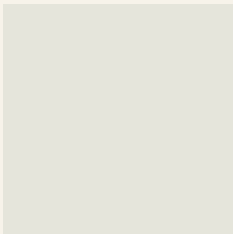


UNDATED PLANNER

# My Legacy Compass

Preparation is one form of care.



DEVICE

CALENDAR

WEEK START

iPad 11-inch / Goodnotes

Undated

Monday

YEAR AT A GLANCE

|                 |                |                |                |
|-----------------|----------------|----------------|----------------|
| 01<br>January   | 02<br>February | 03<br>March    | 04<br>April    |
| 05<br>May       | 06<br>June     | 07<br>July     | 08<br>August   |
| 09<br>September | 10<br>October  | 11<br>November | 12<br>December |

INCLUDED

12 months - 52 weeks - Goals - Habits - Notes

Layout - stacked week - intentions month

|            |           |            |         |
|------------|-----------|------------|---------|
| WEEK INDEX | THIS WEEK | THIS MONTH | PREPARE |
|------------|-----------|------------|---------|

MONTH 1

# Planning Month

| W  | MON | TUE | WED | THU | FRI | SAT | SUN |
|----|-----|-----|-----|-----|-----|-----|-----|
| 01 | W1  |     |     |     |     |     |     |
| 02 | W2  |     |     |     |     |     |     |
| 03 | W3  |     |     |     |     |     |     |
| 04 | W4  |     |     |     |     |     |     |
| 05 | W5  |     |     |     |     |     |     |
|    |     |     |     |     |     |     |     |

WEEKS

W1

W2

W3

W4

W5

DOCUMENTS / CONVERSATIONS

APPOINTMENTS / REVIEW DATES

WEEK 1

# Preparation Week

Make one practical decision at a time, with privacy, trusted people, and formal documents kept in view.

| CONVERSATION TO HAVE |  | DOCUMENT TO LOCATE | DECISION TO CONFIRM |
|----------------------|--|--------------------|---------------------|
|                      |  |                    |                     |

MON

LOCATE / DISCUSS / RECORD

1

TUE

LOCATE / DISCUSS / RECORD

2

WED

LOCATE / DISCUSS / RECORD

3

THU

LOCATE / DISCUSS / RECORD

4

FRI

LOCATE / DISCUSS / RECORD

5

SAT

LOCATE / DISCUSS / RECORD

6

SUN

LOCATE / DISCUSS / RECORD

7

TRUSTED PEOPLE

DOCUMENTS

HOUSEHOLD CONTINUITY

PROFESSIONAL FOLLOW-UP

PREPARE

# Start Here

Define the purpose, scope, trusted people, and boundaries of this organizer before adding details.

|                                                                                         |                                                                                       |
|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <div>WHO THIS SUPPORTS</div> <div><div></div><div></div><div></div><div></div></div>    | <div>WHY I AM PREPARING</div> <div><div></div><div></div><div></div><div></div></div> |
| <div>TRUSTED CONTACTS</div> <div><div></div><div></div><div></div><div></div></div>     | <div>WHAT BELONGS HERE</div> <div><div></div><div></div><div></div><div></div></div>  |
| <div>WHAT STAYS ELSEWHERE</div> <div><div></div><div></div><div></div><div></div></div> | <div>NEXT REVIEW DATE</div> <div><div></div><div></div><div></div><div></div></div>   |

REVIEW

# Action Tracker

Move each preparation task through a clear owner, next action, and review date.

| TASK | OWNER | NEXT ACTION | REVIEW | DONE |
|------|-------|-------------|--------|------|
|      |       |             |        |      |
|      |       |             |        |      |
|      |       |             |        |      |
|      |       |             |        |      |
|      |       |             |        |      |
|      |       |             |        |      |
|      |       |             |        |      |
|      |       |             |        |      |
|      |       |             |        |      |
|      |       |             |        |      |
|      |       |             |        |      |