



YOUR FINANCIAL LEGACY BLUEPRINT

SCROLL TO BEGIN



STEP 1: DEFINE YOUR LEGACY GOALS

Goal Setting: List down your top 3 financial goals. Consider what you want to achieve in the next 5, 10, and 20 years.

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Legacy Vision: Describe the legacy you wish to leave behind. How do you want your wealth to impact your family, community, or the causes you care about?

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STEP 2: ASSESS YOUR FINANCIAL HEALTH

Assets Inventory: Summarize your current assets, including savings, investments, property, and other valuable items.

ASSET	VALUE

ASSET	VALUE

Liabilities Review: List your current liabilities, such as mortgages, loans, and other debts.

LIABILITY	AMOUNT

LIABILITY	AMOUNT

Income & Expenses Snapshot: Provide an overview of your monthly income and expenses to understand your cash flow.

INCOME	AMOUNT

EXPENSE	AMOUNT

STEP 3: IDENTIFY OPPORTUNITIES & CHALLENGES

Opportunities: Based on your assets and income, identify areas where you could potentially grow your wealth.

1. _____	11. _____
2. _____	12. _____
3. _____	13. _____
4. _____	14. _____
5. _____	15. _____
6. _____	16. _____
7. _____	17. _____
8. _____	18. _____
9. _____	19. _____
10. _____	20. _____

Challenges: Acknowledge any financial challenges or obstacles that might hinder your goals and how you currently plan to address them.

1. _____	11. _____
2. _____	12. _____
3. _____	13. _____
4. _____	14. _____
5. _____	15. _____
6. _____	16. _____
7. _____	17. _____
8. _____	18. _____
9. _____	19. _____
10. _____	20. _____

STEP 4: YOUR ACTION PLAN OUTLINE

Short-Term Strategies: Outline steps you can take in the next 1-2 years to improve your financial health or to start working towards your goals.

- | | |
|-----------|-----------|
| 1. _____ | 11. _____ |
| 2. _____ | 12. _____ |
| 3. _____ | 13. _____ |
| 4. _____ | 14. _____ |
| 5. _____ | 15. _____ |
| 6. _____ | 16. _____ |
| 7. _____ | 17. _____ |
| 8. _____ | 18. _____ |
| 9. _____ | 19. _____ |
| 10. _____ | 20. _____ |

Long-Term Strategies: Draft a broader strategy for long-term goals, including any changes in investment, saving, or spending habits.

- | | |
|-----------|-----------|
| 1. _____ | 11. _____ |
| 2. _____ | 12. _____ |
| 3. _____ | 13. _____ |
| 4. _____ | 14. _____ |
| 5. _____ | 15. _____ |
| 6. _____ | 16. _____ |
| 7. _____ | 17. _____ |
| 8. _____ | 18. _____ |
| 9. _____ | 19. _____ |
| 10. _____ | 20. _____ |

Summarize any additional steps you want to take in your financial journey.



NEXT STEPS?

Congratulations on completing your Financial Legacy Blueprint. This worksheet is just the beginning of your journey. With personalized advice and strategic planning, AMC Legacy Builders is here to guide you every step of the way. Together, we can turn your financial goals into a lasting legacy.

Visit our website to schedule your discovery call today.

WWW.AMCLEGACYBUILDERS.COM