



TO BE(QUEATH) OR NOT TO BE (QUEATH)

All or nothing (or somewhere in between)

"I want to leave my children enough so they can do anything, but not so much that they can do nothing." - Warren Buffett

Lead-in...Prioritize

Regarding your net worth and the possibility of leaving some of it behind, please rank the following in order of importance (1-6):

- _____ Enjoy it now (and if none is left over, so be it)
- _____ Give it away now- to family or charity (and if none is left over, so be it)
- _____ Save as much as possible to leave to family
- _____ Save as much as possible to leave to charities
- _____ Find a balance to do it all
- _____ Whatever happens, happens...

In the simplest terms, a hypothetical estate that's left behind without much planning, may end up being split as follows:

80% children/family, 20% taxes

Assuming you want to leave an estate, how would you ideally split your total

_____ % children/family _____ % charity _____ % taxes

Why?

Please work with your attorney and advisor to name or change beneficiaries and legal documents to align with your intentions.



GIVING ACCOUNTABILITY STATEMENT

I _____ intend to stay true to my core values, my net worth manifesto and to live out my purpose to the fullest. I realize this commitment means I may use more of my net worth and see it decline. Yet, I will focus on experiences that bring me joy and confidently give generously to the people and places that are important to me.

I plan on partnering with _____ to maximize this impact.

I will share these intentions with _____ to stay accountable to my plan.

_____/_____/_____
Date

Signature

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