



Legacy Letter Workbook

Introduction: What is a Legacy Letter?

A legacy letter is a heartfelt message you write to the people you care about most. Unlike legal documents such as wills or trusts, a legacy letter is not about distributing assets—it is about sharing your values, life lessons, and memories in your own words.

While traditional estate planning ensures your financial and medical wishes are honored, a legacy letter offers something equally important: a chance to preserve your voice, story, and the wisdom you have gathered over a lifetime. It is a meaningful way to stay connected with loved ones, offering them comfort, guidance, and a deeper understanding of who you are.

This workbook is designed to gently guide you through the process of reflecting on your life and putting your thoughts into words. Whether you are writing to your children, grandchildren, friends, or anyone special, the prompts throughout these pages will help you express what truly matters to you.

Take your time as you move through each section. There are no right or wrong answers—only your honest reflections. The prompts are here to inspire you, but feel free to write as much or as little as you would like. This is your story, voice, and legacy.

1. Personal History

- When and where were you born?
- Who are your immediate family members? Describe your relationships with them.
- Describe your important milestones and memories from childhood and adulthood.
- Describe the key lessons you learned from your family and culture.

2. Faith and Spiritual Reflections

- Colin L. McMichen, Esq.

3. Values and Beliefs

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4. Life Lessons and Wisdom

- What advice would you give your children or grandchildren?
- What mistakes taught you important lessons?
- What are your most important achievements?

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5. Hopes and Wishes for the Future

- [illegible]

6. Creative Expression

- Include creative works such as poems or drawings.
- Add photos accompanied by descriptions of the memories they represent.
- Describe your family traditions.
- Include your favorite family recipes.

7. Messages to Loved Ones

- Write personal notes to your spouse/partner, children, grandchildren, siblings, and friends.
- What do you want each person to remember about you?
- Include words of encouragement or forgiveness.

Tips for Sharing Your Legacy Letter

Writing a legacy letter is a powerful and personal experience but deciding how and when to share it is just as important. Here are some tips to help you pass on your message in a way that honors your intentions and supports your loved ones:

- **Choose the Right Time**

Consider sharing your legacy letter during meaningful moments, such as family gatherings, milestone birthdays, or holidays. You might also choose to share it gradually, one person at a time, to allow for personal reflection.

- **Explain the Purpose**

Let your recipients know why you wrote the letter and how much it means to you. Explaining that it is a way to share your values, hopes, and love beyond legal documents can help them appreciate its importance.

- **Provide a Physical or Digital Copy**

Decide whether you want to give a printed, handwritten letter or a digital copy. Some may appreciate having a beautifully designed physical workbook or keepsake, while others may prefer a digital copy for easy access and sharing.

- **Keep It Private or Share Widely**

You can choose to keep your legacy letter private, to be opened after your passing, or share it during your lifetime to inspire and guide your loved ones. There is no right or wrong—do what feels best for you.

- **Update Over Time**

Your thoughts and wishes may evolve. Revisit your legacy letter periodically and update it as needed, then share the new version with those you trust.

- **Encourage Conversation**

Sharing your legacy letter can open important conversations about family values, hopes, and even practical matters. Encourage your loved ones to ask questions and share their feelings.

Remember, your legacy letter is a gift that can comfort, guide, and inspire long after you are gone.