# ESTATE & LEGACY PLANNING
## EMAIL TEMPLATES

### EMAIL ONE | COMPLETED VS READY
### SUBJECT: WHEN AN ESTATE PLAN FEELS FINISHED

Many estate plans feel complete once the documents are signed.

The will is in place. The trust has been created. Everything appears to be handled.

What could go unexamined is whether that plan is actually ready to be followed.

If something unexpected were to happen, would your family know what to do first? Would they know where to find everything? Would they feel confident making decisions?

A plan could be completed and still leave questions unanswered.

Estate planning is not only about what is written. It is about whether it can be carried out with clarity.

**Legacy & Estate Planning Readiness Quiz CTA:** Visit *{Domain Name}* to take our free **Legacy & Estate Planning Readiness Quiz** to see how prepared your plan may be.

**Estate Readiness Checklist CTA:** Scan the QR code to access the **Estate Readiness Checklist** to learn how organization and clarity could influence your plan.

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### EMAIL TWO | THE FIRST FEW DAYS
### SUBJECT: WHAT HAPPENS FIRST OFTEN GETS OVERLOOKED

Estate planning conversations often focus on long-term outcomes.

Who receives what? How assets are distributed. How the plan is structured.

What may not be discussed is what happens in the first few days.

If something unexpected occurred, would your family know where to begin? Would they know who to contact? Would they know what decisions need to be made first?

Those early moments could shape everything that follows.

Planning is not only about distribution. It is also about direction.

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### EMAIL THREE | ORGANIZATION MATTERS

### SUBJECT: A PLAN CAN EXIST WITHOUT BEING ORGANIZED

In some cases, having an estate plan in place does not always mean everything will be easy to navigate when it is needed.

Documents may exist, but are they easy to locate? Accounts may be established, but are they clearly documented?

Organization plays a role in how a plan functions.

When information is easy to find and understand, decisions can be made more efficiently.

When it is not, delays and confusion could follow.

Estate planning is not only about having the right pieces. It is about how those pieces come together.

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## EMAIL FOUR | THE PEOPLE YOU CHOOSE

### SUBJECT: BEING NAMED IS ONLY PART OF THE EQUATION

Estate plans often identify the people who will make important decisions.

Executors, trustees, and other roles are assigned with care.

What may not be considered is whether those individuals feel prepared.

Do they know what will be expected? Do they know where to begin? Would they feel confident stepping in?

Selecting the right people matters.

Helping them feel prepared can matter just as much.

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### EMAIL FIVE | MORE THAN DOCUMENTS

### SUBJECT: ESTATE PLANNING IS NOT ONLY ABOUT DOCUMENTS

Estate planning is often defined by legal documents.

Wills, trusts, and formal structures are important parts of the process.

What those documents may not always reflect is the experience your family may have when they are used.

Will things feel organized or unclear? Will decisions feel straightforward or difficult?

Planning is not only about transferring assets. It is also about creating a process your family can follow.

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### EMAIL SIX | A DIFFERENT WAY TO LOOK AT IT

**SUBJECT: A DIFFERENT WAY TO THINK ABOUT ESTATE PLANNING**

Some people approach estate planning as a task to complete.

Once the documents are signed, the topic is often set aside.

Another way to look at it is through the lens of readiness.

Is everything organized? Are instructions clear? Would your family know what to do without hesitation?

These questions are not about changing your plan. They are about understanding how it may function.

A simple review could  provide that clarity.

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