



SIMPLICITY FINANCIAL
Providing Clarity and Peace of Mind

Legacy Letter Template for Families with Significant Wealth

A legacy letter is a heartfelt way to share your values, life lessons, and intentions with future generations. For affluent families, it ensures clarity and meaning beyond financial wealth, preserving stories, principles, and purpose. Use this template to craft a message that lasts.



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Communicate Your Values, Vision, and Intentions

Opening Message

Start with a warm greeting and express your love and gratitude.

Core Values & Life Lessons

Reflect on the principles that guided your life. Prompts:
What values shaped your decisions?
What lessons do you want to pass on?



Need guidance? Book Your Private Wealth Strategy Session at
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Communicate Your Values, Vision, and Intentions

Vision for Family & Future Generations

Share your hopes for your family's future and the legacy you want to create.

Philanthropy & Giving Intentions

Outline any charitable goals or causes that matter deeply to you.



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Communicate Your Values, Vision, and Intentions

Instructions for Stewardship & Governance

Provide guidance on family meetings, decision-making, and wealth stewardship.

Closing Message

End with encouragement, blessings, and your signature.



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