



PURPOSEFUL TRUST™ & GIFTS MASTERY PROGRAM

TRUSTWORK #5 – MAKING GIFTS MEMORABLE AND MEANINGFUL

YOUR CLIENTS WILL UNDERSTAND THE POWER OF A PURPOSEFUL GIFT WHEN YOU HELP THEM
TRANSFORM A CASH GIFT OR TANGIBLE PERSONAL PROPERTY INTO LASTING LEGACIES OR
PRICELESS HEIRLOOMS

During the next thirty days...

Ask your client if they have items of tangible personal property which have meant a great deal to them and which they would like to make sure don't get overlooked or thrown away at their death? What is it? Why does it mean so much to them? There is always a story or stories behind the acquisition, handing down, restoration or significance of these items in their lives. Practice telling them the George Washington Swords story. Find a picture of one or more of George Washington's swords and display that graphic with the 80 words from George Washington's Last Will and Testament which made those swords so memorable and meaningful for his family that they were preserved for six and seven generations.

During the next thirty days....tell the West Virginia Miner's Story to illustrate how you can turn a check into a lasting legacy. Share that story with any client who has created a life insurance trust which requires annual Crummey notices or who makes cash gifts to their children or grandchildren during the holidays or on birthdays. Explain to the clients how they could transform that cash gift from being money into a lasting legacy by capturing their love and positive emotions in a West Virginia Miner's Note. Use the log below to keep track of your progress on these two Trustwork assignments so we can discuss your experiences in our next call and learn from your practice:

DATE

WHAT I DID

HOW DID IT GO?

WHAT WOULD I CHANGE?