

Worksheet: What Personal Treasure Will You Share?

Are there any items of non-titled property that you have already been thinking about in terms of inheritance?

List your items here:

Look at your personal items and ask yourself:

- Where do you think this item fits for your plan?
- With whom are you thinking about sharing this item with?
- Will this be given to them now, as an inheritance, or are you uncertain?

Creativity is encouraged – maybe talk with a friend or someone who does not have an emotional attachment to the item.



Worksheet: Make a Plan for Your Personal Treasure

Item	Why is this of value to you? (sentimental, monetary, history, other)	Whom might you share it with? Why? (family, friend, organization, other)	When might you share it? now, specific time or event, inheritance)	How/what to communicate? (the plan to share, about the item or about the value of the item)
Comfortable rocking chair	Sentimental (and practical)	Nephew whom I babysat for when he was little	I still use it – maybe when my nephew gets his own place I can see if he'd like it	Conversation – share my good memories about him when he was little, and we would read stories in the chair

Worksheet: Create an Action Plan

It is now time for you to create an action plan that you can successfully accomplish in the next 7 days.

Parts of an Action Plan

1. **Something YOU want or decide to do** (*not what someone else thinks you should do, or that you think you should do*)
2. **Achievable** (*something you can expect to be able to do this week*)
3. **Action-specific** (*for example, sell my house is not a realistic goal to be achieved in less than 7 days, contacting a Realtor® to list the property is realistic; selling the house is the RESULT of actions*)
4. **Answer the questions:**
 - **What? (Specific action)** (*for example, Gather paper documents into one area*)
 - **How much? (Time, distance, amount)** (*for example, 30 minutes.*)
 - **When? (Time of day or which days of the week)** (*for example, after dinner or Monday, Wednesday, Friday*)
 - **How often? (number of days in the week)** (*for example, 3 times; avoid “every day”, if something comes up, it’s better to have succeeded when you say you’ll do something 3 times rather than to feel you’ve failed if you’ve done it 6 times; you feel even better if you do it 7 times when you’ve said you’ll do it 3 or 5 times!*)
5. **Confidence level of 7 or more** (*Ask yourself, “On a scale of 0=not at all sure to 10=totally sure, how sure am I that I will complete the ENTIRE Action Plan?” If you rate your confidence below a 7, you might want to look at the barriers and consider reworking your Action Plan so that it’s something you are confident that you can accomplish. It’s important that you succeed!*)
