



FINANCIAL FORTRESS WORKSHEET: PROTECTING YOUR FUTURE WITH AN IRREVOCABLE TRUST

Strengthen Your Mind - Build Your Future.



- Building wealth takes discipline. Protecting it takes foresight.
- This workbook will help you begin mapping out a plan to **safeguard your assets, create peace of mind, and preserve your legacy** using tools like **irrevocable trusts**.
- Take your time with each section. Think deeply about your financial priorities, long-term goals and the people or causes you want to protect.



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Section 1: Your Current Financial Snapshot

Before you can build a financial fortress, you need to know what you're protecting. Use this space to record your current financial situation as accurately as possible. Assets (List key assets such as real estate, savings or business interests):

Debts or Liabilities (List all debts mortgages, loans or obligations):

Monthly Income and Expenses (Estimate your average inflow/outflow):



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Reflection: What part of your financial picture feels most secure and which feels most exposed?

Section 2: Your Protection Priorities

An irrevocable trust isn't just about wealth, it's about protecting what truly matters to you.

Use this section to clarify what (and who) you want to safeguard for the future.

Top Priorities for Protection:_____

Potential Risks or Threats:



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Section 3: Why Consider an Irrevocable Trust?

This section helps you explore whether an irrevocable trust might align with your goals and values.

Reasons You Might Benefit: Protect assets from creditors, reduce estate taxes, or plan for long-term care.

Reflection:

1. What appeals to you most about creating an irrevocable trust?

2. What concerns or questions do you still have?

3. How might this decision reflect your long-term vision for financial freedom?



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Section 4: Your Legacy Vision

An irrevocable trust can help shape your legacy—not just financially, but emotionally and ethically.

Who Do You Want to Benefit from Your Planning?

Values You Want to Preserve or Pass Down:

Legacy Statement (Optional): Write a short statement describing what you want your legacy to represent.



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Section 5: Action Steps & Professional Guidance

You don't have to have all the answers but you do need to start asking the right questions. Here are a few examples:

Your Next Three Steps:

1. Who do I trust to manage my estate if I can't?

2. How would my family be impacted if something unexpected happened?

3. What assets do I really need to protect?

Professionals to Consult: (Estate attorney, financial planner, tax advisor, etc.)



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Timeline Goal: When do you want your protection plan in place?

Reflection Prompt: What's one action you can take this week to start building your financial fortress?

Financial strength isn't just about accumulation it's about preservation. By planning ahead, you're not just protecting your assets—you're protecting your future self and those who matter most.