

A GUIDED DISCIPLESHIP WORKBOOK · FIELD EDITION

02

FAMILY ORGANIZATIONAL PLAN

Make the important things findable. Prepare the people you love.
Steward the life in your hands.

Follow Jesus. Prepare the people you love.
Steward the life entrusted to you.

Inside this volume

Ten guided record groups with 49 practical checkpoints

Four journeys for preparation, immediate care, and continued support

Biblical teaching, secure record-mapping, and real conversations

ABIDE. BECOME. BE SENT.

START HERE · THE PURPOSE AND THE PRACTICE

PREPARATION IS AN ACT OF LOVE.

This is not a packet to finish and forget. It is a guided practice of discipleship: receive what God has entrusted, make it clear, and serve the people who will carry it with you.

Use the two volumes together

Begin with the Legacy Letter to name your people, faith, stories, and intentions. Then use the Family Organizational Plan to make important records findable and responsibilities understandable. Return to the letter as practical conversations clarify what needs to be said.

The rhythm for every section

1. **Read.** Read the Scripture in context. The KJV excerpt is a starting point, not a replacement for the whole passage.
2. **Reflect.** Use the biblical explanation to consider why this preparation matters and where God may be inviting growth.
3. **Prepare and write.** Follow the instructions. Examples are fictional illustrations, never facts to copy into your own plan.
4. **Talk and act.** Have the suggested conversation where safe and appropriate, and take one faithful step while you can.
5. **Return.** Use the readiness check to identify gaps—not to grade your faith. Review after significant life changes.

Choose a workable pace

Protect a quiet session rather than rushing the entire workbook. Start with one chapter or record group. Leave unknowns visible and name whom to ask. In grief or a crisis, attend to safety and care first; do not let a checklist pressure you into premature decisions.

Working offline

Write by hand, fill the PDF in a compatible reader, or use the self-contained editable HTML. PDF fields have fixed print space; for longer answers, use the app or HTML print view, which expands to include full text. Save completed copies securely. HTML entries are not preserved after closing or reloading unless you print or save a PDF first.

The Legacy Table is a discipleship and organizational tool, not a will, trust, power of attorney, advance directive, or professional legal, financial, tax, or medical advice. Consult qualified professionals. Do not enter passwords, access codes, Social Security numbers, or full account numbers. Naming someone here does not give them legal authority or access to your account.

YOUR WORKING PATH

KNOW WHERE YOU ARE GOING.

Use this as a map to official records and qualified people—not a vault of sensitive identifiers. Each group has a teaching guide followed by a working checklist.

01 Insurance and benefits

Current sources can be found; uncertain coverage or beneficiary questions have a named next step.

02 Banking and credit

Institutions and record locations are mapped, with authority questions left to the appropriate professional.

03 Investments and retirement

Current records and the appropriate advisor are findable; technical decisions are clearly marked for qualified help.

04 Taxes and giving

The relevant records, preparer, and unresolved deadline questions are clearly identified.

05 Deeds, titles, and property

Records and contacts are usable; ownership or transfer questions have a professional next step.

06 Business and other financial responsibilities

Responsibilities, document locations, and continuity contacts are clear without exposing confidential details.

07 Legal papers and identity records

Current formal records and the attorney are findable; uncertain validity or needed changes are referred for review.

08 Care and final wishes

Formal instructions are located, practical care is discussed, and authority questions are identified for professional guidance.

09 Digital life

Archives and secure instruction locations are identified, with no passwords or recovery secrets in the workbook.

10 Family, faith, and community

Meaningful stories, support contacts, and agreed responsibilities are identified—not merely a list of names.

01 · READ, UNDERSTAND, AND PREPARE

Insurance and benefits

Read in context: 1 Timothy 5:8

But if any provide not for his own, and specially for those of his own house, he hath denied the faith, and is worse than an infidel.

1 Timothy 5:8 · KJV

What the Scripture teaches

First Timothy 5:8 addresses responsibility toward one's household in the context of caring for widows. Reviewing insurance and benefits is one practical way to consider family needs; the passage does not prescribe a particular policy or product.

How to work through this section

1. Locate current policies and benefit statements rather than relying on memory.
2. Record the provider, document location, appropriate contact, and the review needed—not policy numbers or access credentials.
3. Ask the provider or qualified advisor about beneficiary records, coverage questions, deadlines, and claim requirements. Mark products you do not have as not applicable.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'Employer benefits: current statement in the work folder. Human resources can explain survivor benefits. Beneficiary review requested for next month.'

A conversation to have

Who would know which providers to contact, and have they been told where the current records are?

Pray: God, help me care for my household wisely without pretending I can remove every uncertainty.

Ready to move forward: Current sources can be found; uncertain coverage or beneficiary questions have a named next step.

WORKING PAGE · 01

Insurance and benefits

Read and reflect: 1 Timothy 5:8

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

☐ Life insurance and beneficiary records

☐ Accidental death or veterans' benefits

☐ Employer and pension benefits

☐ Funeral or prepaid arrangements

WORKING PAGE · 01 · CONTINUED

Insurance and benefits

Read and reflect: 1 Timothy 5:8

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

☐ Mortgage or credit insurance

☐ Workers' compensation and disability benefits

☐ Health insurance contacts

☐ Home, vehicle, and property insurance

02 · READ, UNDERSTAND, AND PREPARE

Banking and credit

Read in context: Proverbs 27:23

Be thou diligent to know the state of thy flocks, and look well to thy herds.

Proverbs 27:23 · KJV

What the Scripture teaches

Proverbs 27:23 teaches attentive stewardship through the picture of knowing the condition of one's flocks. Applied here, the aim is responsible awareness and clarity—not anxiety, secrecy, or finding security in a balance.

How to work through this section

1. Identify the institutions used for everyday banking and credit.
2. Locate official statements and any safe deposit arrangements. Record where authorized access is explained, not keys, combinations, credentials, or account numbers.
3. Ask the institution or attorney how ownership and lawful access work. Do not assume that a shared household relationship authorizes access.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'Everyday banking: current statement folder. The bank can explain account ownership. Safe deposit arrangements need a review with the bank and attorney.'

A conversation to have

Could the appropriate person identify the bank and ask the right questions without receiving your passwords?

Pray: Lord, help me make ordinary responsibilities clear and keep sensitive information secure.

Ready to move forward: Institutions and record locations are mapped, with authority questions left to the appropriate professional.

WORKING PAGE · 02

Banking and credit

Read and reflect: Proverbs 27:23

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

☐ Checking, savings, and certificate-of-deposit records

☐ Credit and debit card institutions

☐ Safe deposit box location and authorized access

03 · READ, UNDERSTAND, AND PREPARE

Investments and retirement

Read in context: Luke 12:15

And he said unto them, Take heed, and beware of covetousness: for a man's life consisteth not in the abundance of the things which he possesseth.

Luke 12:15 · KJV

What the Scripture teaches

Luke 12:15 warns that life does not consist in an abundance of possessions. Investment and retirement records matter because they serve people and responsibilities, not because they measure the worth of a life.

How to work through this section

1. Locate current retirement, investment, and annuity records.
2. Record the advisor or provider and where official details live. Avoid estimates or assumed beneficiary arrangements.
3. Request a professional review of beneficiary designations and any questions about taxes, withdrawals, or transfers; do not make changes from this checklist alone.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'Retirement statement: annual records folder. Advisor can explain beneficiary information and the next review. No distribution decision has been made here.'

A conversation to have

What practical questions would your family need an advisor to explain rather than guess about?

Pray: Jesus, keep my hope rooted in You and help me steward these resources with humility.

Ready to move forward: Current records and the appropriate advisor are findable; technical decisions are clearly marked for qualified help.

WORKING PAGE · 03

Investments and retirement

Read and reflect: Luke 12:15

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

☐ Retirement accounts and beneficiary review

☐ Investment, stock, and bond records

☐ Annuity records and advisor contacts

04 · READ, UNDERSTAND, AND PREPARE

Taxes and giving

Read in context: Romans 13:7; 2 Corinthians 9:7

Render therefore to all their dues: tribute to whom tribute is due; custom to whom custom; fear to whom fear; honour to whom honour.

Romans 13:7 · KJV

What the Scripture teaches

Romans 13:7 calls believers to fulfill what is owed. Second Corinthians 9:7 describes willing, unpressured giving. Keep tax responsibilities and generosity clear without reducing generosity to a tax strategy.

How to work through this section

1. Locate recent returns, property tax records, giving records, and the preparer's contact.
2. Ask a qualified tax professional which records and deadlines apply to your circumstances. Do not invent a universal filing schedule.
3. Identify the current status of payments or outstanding questions using official records, and assign a review step where information is missing.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'Recent returns and giving records: labeled tax folder. Preparer can advise on retention and deadlines. Property-tax statement still needs locating.'

A conversation to have

Who can explain upcoming obligations, and what needs attention before the next professional review?

Pray: God, help me fulfill responsibilities honestly and practice generosity willingly.

Ready to move forward: The relevant records, preparer, and unresolved deadline questions are clearly identified.

WORKING PAGE · 04

Taxes and giving

Read and reflect: Romans 13:7; 2 Corinthians 9:7

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

☐ Income tax returns and preparer contact

☐ Property tax statements

☐ Gift tax returns, where applicable

☐ Charitable giving records

☐ Estimated payments and important deadlines

05 · READ, UNDERSTAND, AND PREPARE

Deeds, titles, and property

Read in context: Colossians 3:23

And whatsoever ye do, do it heartily, as to the Lord, and not unto men;

Colossians 3:23 · KJV

What the Scripture teaches

Colossians 3:23 calls for wholehearted service to the Lord in daily work. Caring for deeds, titles, and agreements can be ordinary faithful service; it does not mean a written preference creates a valid transfer.

How to work through this section

1. Locate current deeds, titles, mortgage records, appraisals, and relevant agreements.
2. Describe where originals or official copies are held and who can explain them.
3. Ask an attorney or appropriate professional to clarify ownership, obligations, and intended transfers. Note unresolved issues without attempting legal instructions here.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'Property records: attorney's file and home folder. We need to confirm which documents are current and discuss our intentions before making changes.'

A conversation to have

Which responsibility or ownership assumption might surprise the next person who has to help?

Pray: Lord, help me handle what is entrusted to me carefully and consider the people affected.

Ready to move forward: Records and contacts are usable; ownership or transfer questions have a professional next step.

WORKING PAGE · 05

Deeds, titles, and property

Read and reflect: Colossians 3:23

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

☐ Property deeds and appraisals

☐ Mortgage records

☐ Vehicle, boat, and other titles

☐ Memberships and property-related agreements

06 · READ, UNDERSTAND, AND PREPARE

Business and other financial responsibilities

Read in context: 1 Peter 4:10

As every man hath received the gift, even so minister the same one to another, as good stewards of the manifold grace of God.

1 Peter 4:10 · KJV

What the Scripture teaches

First Peter 4:10 presents gifts as entrusted for serving others. Business and work responsibilities affect real people; preparation should consider employees, partners, clients, and dependents, not only the value of an asset.

How to work through this section

1. Identify ongoing business interests, employment benefits, loans, and recurring commitments.
2. Name the contacts who can explain formal agreements and continuity responsibilities.
3. Discuss succession or interruption plans with appropriate partners and professionals. Do not assign authority or disclose confidential business information in a general family workbook.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'Business agreements are with the attorney. The operations contact can identify urgent continuity needs. Formal succession arrangements need a professional review.'

A conversation to have

Who would be affected by an interruption, and have the people expected to help agreed to their role?

Pray: Father, help me serve the people connected to my work with foresight and integrity.

Ready to move forward: Responsibilities, document locations, and continuity contacts are clear without exposing confidential details.

WORKING PAGE · 06

Business and other financial responsibilities

Read and reflect: 1 Peter 4:10

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

☐ Business interests and succession contacts

☐ Corporate or employment benefit plans

☐ Loan agreements and obligations

☐ Disability or survivor benefit records

☐ Recurring commitments and subscriptions

07 · READ, UNDERSTAND, AND PREPARE

Legal papers and identity records

Read in context: Proverbs 15:22

Without counsel purposes are disappointed: but in the multitude of counsellors they are established.

Proverbs 15:22 · KJV

What the Scripture teaches

Proverbs 15:22 values counsel rather than isolated assumptions. Wise discipleship includes recognizing the limits of our expertise and seeking qualified help for documents that establish rights or authority.

How to work through this section

1. Locate the current signed documents and identify the attorney who can explain them.
2. Record document locations and review questions. Do not copy identity numbers or sensitive originals into this workbook.
3. Ask about validity, changes in circumstances, and coordination among documents and beneficiary arrangements. This workbook neither creates nor updates a legal instrument.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'Estate documents: attorney and secure home folder. Review needed after a family change. Identity documents are stored separately; no numbers copied here.'

A conversation to have

Does the appropriate person know whom to contact for a reliable explanation of the formal documents?

Pray: God, give me humility to seek counsel and courage to address what I have postponed.

Ready to move forward: Current formal records and the attorney are findable; uncertain validity or needed changes are referred for review.

WORKING PAGE · 07

Legal papers and identity records

Read and reflect: Proverbs 15:22

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

☐ Will, trust, and attorney contact

☐ Financial power of attorney

☐ Marriage or relationship agreements

☐ Birth, marriage, citizenship, and identity document locations

☐ Final instructions and formal arrangements

☐ Review of beneficiaries with the appropriate professional

08 · READ, UNDERSTAND, AND PREPARE

Care and final wishes

Read in context: Galatians 6:2

Bear ye one another's burdens, and so fulfil the law of Christ.

Galatians 6:2 · KJV

What the Scripture teaches

Galatians 6:2 calls us to bear one another's burdens in Christ. Care preparation can make room for compassionate presence, while acknowledging that medical and legal decisions require appropriate authority and expertise.

How to work through this section

1. Locate advance directives and the appropriate clinician or attorney contact.
2. Discuss care needs for dependents and pets with the people who may help; verify willingness and capacity.
3. Record where formal service, donation, or care arrangements live. Do not treat this checklist as consent, a medical directive, or an appointment of a decision-maker.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'Care directions: signed documents in the secure folder. The clinician can explain the current instructions. A trusted friend has agreed to help with pet care.'

A conversation to have

What would help the people involved offer practical care without having to guess about authority or preferences?

Pray: Jesus, teach us to accompany one another with patience, compassion, and wise help.

Ready to move forward: Formal instructions are located, practical care is discussed, and authority questions are identified for professional guidance.

WORKING PAGE · 08

Care and final wishes

Read and reflect: Galatians 6:2

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

☐ Advance directive and health care decision-maker

☐ Care team and appropriate contact information

☐ Dependent and pet care arrangements

☐ Organ donation documentation, if applicable

☐ Burial, cremation, or service arrangements

☐ Pastor or church contact and remembrance preferences

09 · READ, UNDERSTAND, AND PREPARE

Digital life

Read in context: 1 Corinthians 14:40

Let all things be done decently and in order.

1 Corinthians 14:40 · KJV

What the Scripture teaches

First Corinthians 14:40 concerns order in the gathered church. It does not establish a rule for digital estates, but orderly, considerate preparation can serve the same practical aim of reducing confusion rather than creating it.

How to work through this section

1. Identify where your password manager and digital estate arrangements are kept. Never enter the credentials or recovery codes here.
2. Review lawful access and provider-specific procedures with appropriate professionals; access to a device is not permission to impersonate its owner.
3. Identify subscriptions, archives, photographs, and backups that need attention. Keep secure instructions separate from copies you may share more widely.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'Photographs: family archive with a separate backup. Secure recovery instructions are held elsewhere. Ask the appropriate professional about provider procedures before accessing an account.'

A conversation to have

Which memories should be preserved, and who understands where lawful, secure access arrangements are documented?

Pray: Lord, help me protect privacy and preserve what will genuinely serve others.

Ready to move forward: Archives and secure instruction locations are identified, with no passwords or recovery secrets in the workbook.

WORKING PAGE · 09

Digital life

Read and reflect: 1 Corinthians 14:40

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

- ☐ Password manager location and authorized recovery arrangements—no credentials here

- ☐ Digital account and device instructions stored securely elsewhere

- ☐ Subscriptions and recurring digital expenses

- ☐ Photographs, family archives, and backups

10 · READ, UNDERSTAND, AND PREPARE

Family, faith, and community

Read in context: Deuteronomy 6:6–7

And thou shalt teach them diligently unto thy children, and shalt talk of them when thou sittest in thine house, and when thou walkest by the way, and when thou liest down, and when thou risest up.

Deuteronomy 6:7 · KJV

What the Scripture teaches

Deuteronomy 6:6–7 locates faith formation in repeated, everyday conversations. A legacy includes a lived witness and a community of care, not just names in an address book.

How to work through this section

1. Identify faith stories, traditions, and family records worth preserving.
2. Name the church, ministry, friends, and advisors who can offer appropriate help; use current contact details where needed.
3. Discuss responsibilities with people rather than merely recording their names. Consider overlooked relationships and the need for reconciliation where safe and appropriate.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'Our church contact knows the family. I want to record the story of how people cared for us during a difficult year and talk with the relative whose help I have assumed.'

A conversation to have

Who helps your family remember God's faithfulness, and what story should be told while you can tell it?

Pray: Father, make my legacy a living witness to Your grace and a source of care for others.

Ready to move forward: Meaningful stories, support contacts, and agreed responsibilities are identified—not merely a list of names.

WORKING PAGE • 10

Family, faith, and community

Read and reflect: Deuteronomy 6:6–7

Check an item when it has been located or addressed. Note the location, contact person, or next step. A check does not confirm legal validity or grant access. Mark “not applicable” in the note where appropriate.

- ☐ Faith testimony, family stories, and meaningful traditions

- ☐ Church, ministry, and charitable contacts

- ☐ Close family, friends, and professional advisors

- ☐ Family tree and records worth preserving

- ☐ People prepared to carry responsibilities

JOURNEY 1 • READ, UNDERSTAND, AND PREPARE

Prepare now

Read in context: James 4:13–15

For that ye ought to say, If the Lord will, we shall live, and do this, or that.

James 4:15 • KJV

What the Scripture teaches

James 4:13–15 teaches humble dependence on God rather than certainty about tomorrow. Preparation is faithful attention to today's responsibilities, not a claim to control the future.

How to work through this section

1. Set aside an unhurried session for prayer and the first letter chapter; you do not need to finish everything in one sitting.
2. Work through one record group at a time, locating originals and writing down gaps.
3. Have one trusted-person conversation, arrange needed professional help, and schedule a review.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'This week: write the opening letter. Next session: locate legal records. Then: meet the appropriate advisor and tell our trusted person where the secure copy lives.'

A conversation to have

What is one preparation step that would serve your people now, even if the rest is unfinished?

Pray: Lord, help me act faithfully today without fearfully trying to control tomorrow.

Ready to move forward: The next session, conversation, and professional question are specific enough to act on.

WORKING PAGE · PREPARE NOW

Prepare now

Read and reflect: James 4:13–15

Take these steps with the appropriate trusted people and qualified professionals. Requirements and legal authority vary; this checklist is not a substitute for their guidance.

- ☐ Begin your letter and name the people entrusted to you.
- ☐ Locate the essential records and identify qualified advisors.
- ☐ Discuss responsibilities with the people involved.
- ☐ Store the completed documents securely and schedule a review.

Make room for prayer, grief, patience, wise counsel, and practical love. Take one faithful step at a time.

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JOURNEY 2 · READ, UNDERSTAND, AND PREPARE

When a death or incapacity occurs

Read in context: Psalm 46:1; Galatians 6:2

God is our refuge and strength, a very present help in trouble.

Psalm 46:1 · KJV

What the Scripture teaches

Psalm 46 presents God as a present refuge in trouble, not a promise that grief will be absent. Galatians 6:2 encourages shared burdens. The first response should prioritize safety, compassionate presence, and appropriate help—not immediate financial activity.

How to work through this section

1. In an emergency, contact the appropriate emergency or medical services first. This workbook is not an emergency protocol.
2. Bring in the trusted support people and appropriate care or legal professionals. Locate formal instructions without assuming authority from the workbook.
3. Attend to immediate household and dependent needs. Avoid rushed financial decisions or pressure to resolve everything at once.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'After urgent medical needs are addressed, contact the named support person and pastor. Ask the appropriate professional which formal instructions apply and arrange help for dependents.'

A conversation to have

Who can be present, who can help practically, and who is qualified to explain the next formal step?

Pray: God of refuge, meet us in uncertainty. Give us wise help and the grace to bear one another's burdens.

Ready to move forward: Urgent safety and care needs are addressed, support is present, and formal questions are directed to qualified help.

WORKING PAGE • WHEN A DEATH OR INCAPACITY OCCURS

When a death or incapacity occurs

Read and reflect: Psalm 46:1; Galatians 6:2

Take these steps with the appropriate trusted people and qualified professionals. Requirements and legal authority vary; this checklist is not a substitute for their guidance.

- ☐ Contact appropriate emergency or medical services first when needed.
- ☐ Contact the trusted person, pastor, and care or legal professional named in the plan.
- ☐ Locate legally valid directions and the professionals who can explain them.
- ☐ Care for dependents, pets, and immediate household needs. Avoid rushed financial decisions.

Make room for prayer, grief, patience, wise counsel, and practical love. Take one faithful step at a time.

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JOURNEY 3 • READ, UNDERSTAND, AND PREPARE

In the first weeks

Read in context: Proverbs 15:22

Without counsel purposes are disappointed: but in the multitude of counsellors they are established.

Proverbs 15:22 • KJV

What the Scripture teaches

Proverbs 15:22 invites counsel when decisions exceed one person's knowledge. Grief can make ordinary tasks difficult; seeking support is not a failure of faith or a reason to surrender decisions to pressure.

How to work through this section

1. Ask the appropriate professional to explain who has authority and which actions or deadlines apply.
2. Gather the records they request, using the organizational plan as a map—not as permission to act.
3. Track essential commitments while allowing time for grief, prayer, rest, and family conversations. Ask for specific practical help.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'The attorney will explain the formal next steps. A trusted friend will help locate records and arrange meals. Financial changes wait for appropriate guidance.'

A conversation to have

Which decision needs professional advice, and which practical burden could someone safely help carry this week?

Pray: Father, give us wisdom for decisions and patience with one another's grief.

Ready to move forward: Authority and applicable deadlines are clarified with professionals; practical support and unresolved questions are visible.

WORKING PAGE · IN THE FIRST WEEKS

In the first weeks

Read and reflect: Proverbs 15:22

Take these steps with the appropriate trusted people and qualified professionals. Requirements and legal authority vary; this checklist is not a substitute for their guidance.

- ☐ Work with the appropriate professional to establish who has authority to act.
- ☐ Ask professionals which certificates, notifications, and benefit claims are needed.
- ☐ Gather records, protect property, and track essential household commitments.
- ☐ Make room for grief, prayer, practical help, and family conversations.

Make room for prayer, grief, patience, wise counsel, and practical love. Take one faithful step at a time.

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JOURNEY 4 • READ, UNDERSTAND, AND PREPARE

In the months ahead

Read in context: 1 Peter 4:10

As every man hath received the gift, even so minister the same one to another, as good stewards of the manifold grace of God.

1 Peter 4:10 • KJV

What the Scripture teaches

First Peter 4:10 calls us to serve with entrusted gifts. In a changed season, faithful stewardship includes adapting responsibilities and receiving support; preserving a legacy does not require freezing a family's life in the past.

How to work through this section

1. Review ongoing care, household, business, and financial responsibilities with appropriate professionals.
2. Preserve stories and memories deliberately, while making room for different ways of grieving.
3. Revisit what the family needs now and set the next review. Do not treat the original plan as an unchangeable script.

A FICTIONAL EXAMPLE—NOT YOUR ANSWER

For example: 'We will review household responsibilities with appropriate support, preserve the family photographs, and revisit the plan in three months as needs become clearer.'

A conversation to have

What should be preserved, what needs to change, and who could help the family move forward faithfully?

Pray: Jesus, guide us in this changed season. Help us honor what mattered and serve the people before us now.

Ready to move forward: Responsibilities are being reviewed, meaningful stories are preserved, and another check-in is scheduled.

WORKING PAGE · IN THE MONTHS AHEAD

In the months ahead

Read and reflect: 1 Peter 4:10

Take these steps with the appropriate trusted people and qualified professionals. Requirements and legal authority vary; this checklist is not a substitute for their guidance.

- ☐ Review ongoing responsibilities, deadlines, and official records with qualified advisors.
- ☐ Confirm care, household, business, and financial arrangements as appropriate.
- ☐ Preserve stories, photographs, and the faith and wisdom worth carrying forward.
- ☐ Revisit the family's needs with patience. Take one faithful step at a time.

Make room for prayer, grief, patience, wise counsel, and practical love. Take one faithful step at a time.

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REVIEW AND KEEP LIVING IT

MAKE IT USABLE. KEEP IT CURRENT.

The outcome is not a perfect document. It is a clearer witness, a prepared person, and a next faithful act of love.

Review before you share

1. Read what you have written for accuracy, kindness, and clarity. Remove sensitive credentials and unsupported assumptions.
2. Distinguish wishes from formally documented decisions. Ask qualified professionals to address any question about validity, authority, taxes, finances, or medical care.
3. Choose the appropriate people and the portions they actually need. A family letter, a practical plan, and secure access instructions may need different recipients.
4. Explain where the securely stored current copy lives. Do not assume someone knows about it or has agreed to a responsibility.
5. Set the next review in your calendar. Revisit after a move, relationship change, new dependent, significant health change, or a professional update to formal documents.

A conversation you can start

“I am preparing this because I love you, not because I can control what happens. Can we look at what is clear, what still needs help, and the responsibility you are actually willing to carry?”

Faithfulness continues outside the workbook

Tell a story. Ask forgiveness where appropriate. Practice generosity. Check on someone who carries a burden. These are not rewards for finishing your preparation; they are part of the legacy you are living today.

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