

KARMIC LEGACIES



Creating Positive Change with Your Legacy.

WELCOME TO KARMIC LEGACIES

I Britta Tilgner, am so excited for you and for every person you will be helping now and in the future. Making end-of-life plans doesn't usually sound fun or exciting and I realize my choice of words may initially seem off-putting to some. I'd like to pose the question though, why not make this fun? Without these plans in place, your estate may not end up with who you'd choose for it to go to.

This is your journey, and I believe it can be exciting if we choose to make it so. I intend to help make this part of planning as enjoyable as it can be, one that we can plan together, and after that plan is made, you can get back to focusing on other things in life that bring you joy today. I am excited to get to know who you are, what you are about, what your journey has been like so far and all the colorful things that make you, you.

I am truly honored to be trusted with your legacy, and I do not say this lightly. What we are going to do is major. The ripple effect of change we are going to create in this world is major. The trust you are putting in my hands with everything you have built till now is major. I take this very seriously and I promise you I will do everything in my power to fiercely protect what you have built.

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DISCLAIMER BEFORE WE START:

Please note, this document is not a legal Will. This document is merely for me to understand you, your life, and your wishes better. For me to be able to act on any of your wishes, you need to have Karmic Legacies listed in your Will. Naming Karmic Legacies as a beneficiary in your Will, along with this document will give us the legal green light to carry your wishes out as you intended them to be with Karmic Legacies.

This document here gives us more information about you. The two are separate and must not be confused. Please acknowledge that you understand this document is not your legal Will.

I acknowledge this document is not my legal Will.

Name:

Date:

Signed:

Great! Now that we have cleared that up, let's get to the fun stuff!

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ALL ABOUT YOU:

To preserve the memory of who you are, I will be asking you some questions. You are not obliged to answer all of them or any of them for that matter, but I do encourage you to tell me a bit about you before we meet. Getting a general idea of who you are will give me time to digest this beforehand and may inspire questions I would not think about asking if we were meeting for the first time in the moment. To get a more encompassing idea of who you are, please tell me a little about yourself now so we can discuss even more things together later when we meet. We will use this info later to write a summary of your life's story. One story will be in short form for the plaque outside your home, and our posts online. One will be in longer form for preserving the history of you, which will be kept on display at your home and in safe keeping in our records. Please fill out as much as you feel inclined to. If you need more space than what the form allows, there will be more room at the end of this document to add anything else you would like to mention.

Your full name:

Your e-mail:

Date of birth:

Phone number:

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Physical address:

Mailing address (if different from your physical address):

What are your

religious,

spiritual, or atheist beliefs?

How has holding this belief served you in life?

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Did you always hold the beliefs mentioned above or did you believe in something else to start with? If they changed, what brought you to that change?

What was the family you grew up with like? What beliefs did they have? What physical environment did you grow up in (farm, city etc...)

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What are some lessons you've learned from family members, whether they were passed down or merely observed?

Did you have or do you have a family of your own now or previously? What were they like? What lessons have you learned from them whether shared or merely observed?

What would your spouse or previous love say about you if asked?

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What would your friends say about you if asked?

What would your family say about you if asked?

What would your employers say about you if asked?

What would your enemies (or those who simply aren't fond of you) say about you if asked?

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Tell me about the key love relationships in your life, past or present. You can list more than one. Who were they? What do you love about them? What drove you nuts? How did they shape who you are now?

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Food for thought: What types of food and beverages do you typically enjoy?

What types of foods or beverages do you specifically not enjoy or don't consume for specific reasons and why?

Do you smoke?

No

Yes

If yes, preferred type:

Do you drink alcoholic beverages?

No

Yes

If yes, preferred drinks:

Anything else?

No

Yes

If yes, preferred type:

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Why do you or why don't you consume the above?

What was the main occupation you pursued? What did you love and what did you not enjoy about it? Why did you pursue it? This question applies to stay-at-home parents, partners, students as well as people who were employed. Tell me about your life-path.

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Any other occupations you feel like mentioning that you engaged in?

What sports, hobbies, or groups have you participated in that you enjoy?

What were some of the hardest times in your life?

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Looking back at those hard times, how did you get through it? What advice would you give someone who is going through the same thing now?

What is some of the best life advice you've received?

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What are some of the things that have brought you joy in the past and now?

What has been important to you in life?

(This can be ideas, feelings, daily rituals, relationships, pets, nature, or anything really)

Have you travelled, if so where to? What did you like and not like? What are your favorite places?

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Tell me something that not many people know about you.

If you had to sum up everything you've learned over the course of your life and offer one piece of advice to the future generation, what would that be?

Thank you for sharing and giving me a glimpse into who you are. I look forward to discussing this further with you!

We are almost done filling out your first information package. There are a few more important questions to answer. Please ensure you complete the questions on the following pages: they will be important.

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Is there anything mentioned here that you do not want shared publicly in a write-up?

No, you can share whatever you think would make a good life summary.

No, I want you to share EVERYTHING, even if you don't think it should be shared, this is my wish.

Yes. I enjoyed the process of reflection and sharing with you, but please do not share the following part publicly.

Do you have any living family, relatives, spouse, friends, or acquaintances who might feel entitled to your assets after you pass? This could be people you have in your Will and/or people you do not have in your Will.

Yes

No

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If yes, who? Please provide full names, and details if possible.

Name:

Phone:

Address:

Name:

Phone:

Address:

Name:

Phone:

Address:

Name:

Phone:

Address:

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Did you or will you be leaving anything for them in your Will?

Yes

No

If yes, please name the person and what you wish to pass down to them.
Please remember, this document is not a legal Will. It is merely a document that can be used as proof of your wishes on the date this was filled out. We may use this to track down people as per your wishes or defend and protect what you don't want to pass down. Please know, while we do our best to honor your wishes here, you must file a legal Will with your lawyer to make it legally valid.

Name:

Contact info if not already listed above:

--

What you want to give them:

Where can this/these items be found:

Name:

Contact info if not already listed above:

--

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What you want to give them:

Where can this/these items be found:

Name:

Contact info if not already listed above:

What you want to give them:

Where can this/these items be found:

Name:

Contact info if not already listed above:

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What you want to give them:

Where can this/these items be found:

If you answered no to leaving anyone anything in your Will, please tell us why you chose to do so. This could be important for fighting for honoring your wishes should it ever come to that. Wills are the most contested legal document in Canada. People can contest them, and they often do. If you aren't leaving anything to anyone, or you are, but there are specific people you do not want to have anything, please tell us who and why you don't want to pass anything down to them. Again, this is not a legal Will. You will need a Will separate from this and these things should be stated in there as well.

Name:

Reason for not passing anything down:

Name:

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Reason for not passing anything down:

Name:

Reason for not passing anything down:

When people contest someone's Will, they often win if there is any evidence to show someone was not of sound mind to be able to make this important decision. Should someone contest your Will, is there a doctor, medical practitioner, therapist, naturopath or any other person you saw in a professional manner that may have records or history with you who could vouch for you having capacity to make these legal decisions now? (Please note, whether you do or don't doesn't necessarily mean it will change anything, but it could).

Professionals who could vouch for you:

Name:

Occupation:

Contact (Phone and address if possible):

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Name:

Occupation:

Contact (Phone and address if possible):

Name:

Occupation:

Contact (Phone and address if possible):

How did you hear about Karmic Legacies?

Google Adds:

Instagram:

Facebook:

Flyer:

Word of mouth:

Other:

Why did you choose to donate to Karmic Legacies?

Upon contacting Karmic Legacies, did you ever feel pressured from us in any way to donate to us or our cause? Yes No

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Please elaborate (If you answered yes, we want to know who you felt pressured from and why you felt so, for us to make sure that doesn't happen again to you or anyone else. If you answered no, we'd like to hear more to prove your case in your wishes should they ever be contested in court).

Karmic Legacies will do everything in their power to preserve your home and your legacy. Should there ever come a time where keeping and maintaining your home is no longer feasible, we offer a plan-B and would like to know your wishes in such a circumstance.

- 1) Sell your home and donate the remaining funds to a charity or another organization of your choice.

- 2) Sell your home and donate the remaining funds to a person or persons of your choosing.

- 3) Sell your home and donate the remaining funds to Karmic Legacies to support their vision of helping others get out of debt and rebuild their finances.

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- 4) Sell the home and donate the remaining funds to a combination of some or all of the above.

Please know, selling your home is not our vision and would only be a last resort. This would only be done if it truly were no longer feasible to maintain as part of Karmic Legacies. We want to respect and carry out your wishes. Providing a plan-B is only to give peace of mind and clarity. We promise to do everything we can to stay with Plan- A.

Did you fill out this form yourself? Yes No

If you had help filling out this form, please provide a name and contact info for the person who helped you:

Name:

Their relationship to you:

Contact:

Why did this person help you? Please check all that apply.

I didn't know how the online form worked and needed help.

I didn't know how to save and send the online form and needed help.

I have a disability and require help with things like this.

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They have power of attorney.

When asked about my past or life story, I get confused and need someone to fill in the blanks.

I often forget things about my life story.

I can get confused and overwhelmed easily.

It's another reason. (Please explain)

If you had help filling out this form, do you consent to this person helping you?

Yes

No

If you had help, did you feel pressured by the person helping you to say anything you do not agree with? Yes No

Please feel free to explain:

If you are being coerced by anyone to say or do anything you do not agree with, you can reach out to us separately from this form at any time. Even once we have entered an engagement and started working together, you are allowed to change your mind. You can contact our office in any of the following ways to let us know you do not wish to proceed.

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By telephone: 778-215-3393 (you can **call** or **text** this number).

By e-mail: office@karmiclegacies.com

Contact us through our website at: www.karmiclegacies.com

Send us a letter through Canada Post to:

Karmic Legacies

P.O. Box 1202 Penticton P.O. Main

Penticton, B.C.

V2A 6J9

Continued...

If you ask us to halt the process of signing up with Karmic Legacies, we may take steps to ensure it is you who is making the request. We will be as discrete as we possibly can.

Please acknowledge that you understand you can cancel signing up with Karmic Legacies at any point for any reason.

I know and understand that I can cancel signing up with Karmic Legacies at any time.

I acknowledge that Karmic Legacies might ask why I am changing my mind.

I acknowledge that Karmic Legacies may need to confirm it is me who is making the request to cancel. This is to ensure someone else isn't attempting to interfere with my wishes.

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Signed:

Date:

All those investigative questions aside, we look forward to starting this journey of preserving your legacy with you! We will review your stories and quite likely have follow-up questions.

After you submit this form, we will send you an email confirmation that we have received your form. If you do not receive a confirmation email within 3 days of sending, please contact us. After we receive this initial welcome package, we will send a follow-up submission form, asking for more

details of your home, property, and pets if you have them so we can better understand how to take care of everything. You've done a lot today. For now, take a break and relax! We will be in touch again soon.

Thank you!

This completes your first welcome package and form. Please remember to “Save” and send this form back to us.

You can email it to: office@karmiclegacies.com

Or print and mail it via Canada Post to:

Karmic Legacies

Re: Welcome Package

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P.O. BOX 1202 Penticton P.O. Main

Penticton, B.C. Canada

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WAIT! I HAVE MORE TO ADD BUT I HAD NO ROOM!

Is there anything else you would like to share with others about you or life in general? Please use this section for sharing anything I didn't think to ask yet. You can also use this section to add onto any of the previous topics you may not have had enough room for. You can use this section for anything really.

End of welcome package 1.

Please remember to save and send to Karmic Legacies.

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