MassMutual Ascend

# Legacy Planning Conversation Starters

Estate planning is an important step in safeguarding your clients' legacies. However, some clients may hesitate to engage in these conversations. Many find estate planning to be too complex, aren't aware of the benefits or simply haven't made the time.

Regardless of the reason, the following prompts can help overcome conversational roadblocks and start a conversation about the importance of estate planning with your clients.

1. Who would you like to inherit your assets? Are your current beneficiary designations in line with your wishes?
2. Who would you like to make medical and non-medical decisions on your behalf if you lack capacity?
3. What would life look like for your loved ones in the event of your passing?
4. What would you like to happen in that event?
5. How would you like to be remembered by family, friends and colleagues?
6. What do you want your legacy to achieve for your family and loved ones?
7. What kind of impact do you want your legacy to have on your community?
8. How do you want your legacy to live on after your death?

**Learn more about estate planning and start using our MassMutual Ascend resources at MMAscendConnect.com/BeyondAnnuities.**

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