



THE BEQUEST

Legacy Planner

YOUR DAILY
NAVIGATION TO SUCCESS

Just as water shapes the course of a river, your life thesis molds the journey of your existence. By aligning your core beliefs, values, and purpose with your investment thesis—the vessel that carries you towards your legacy—you create a powerful synergy that can transform your life and impact generations to come.

Imagine the possibilities when your deepest convictions guide your financial decisions, propelling you towards a future rich with meaning and purpose. How might your life change if every investment you made was a reflection of your most cherished values?

As you reflect on the interplay between your life thesis and investment thesis, consider the ripple effects of your choices. Apply these insights to your own journey, seeking opportunities where your beliefs and financial goals converge. Remember, the most fulfilling voyages are those where the current of your convictions powers the sails of your investments.

Your life's work is your ultimate investment—make it count.

-Note from Martin Saenz & Shawn Muneio



Learn More

Your Life Thesis Is the Water

A life thesis is a personal statement that encapsulates your core beliefs, values, goals, and purpose in life.

What is my Why?

How do I reach my Why?

Results of my Why?

Your Investment Thesis Is Your Boat

An investment thesis acts as roadmap for investment choices and helps you explain your reasoning for buying, keeping, or selling an asset. Bringing your life and investment thesis together, starts with your vision and mission statement

Vision Statement

(A forward-looking declaration describing what you hope to achieve):

Mission Statement

(A declaration of your core purpose, values and focus. What you're currently doing to meet your Vision Statement):

Defining Your Parameters

By defining your life and investment strategy:

Begin with your financial objectives or total managed assets.

Next, identify the key asset categories you'll prioritize.

Finally, outline your plan for allocating your capital across those chosen areas.

Financial Goal or Total Managed Assets Goal:

Asset Pillars

(Investment classes you plan to invest in):

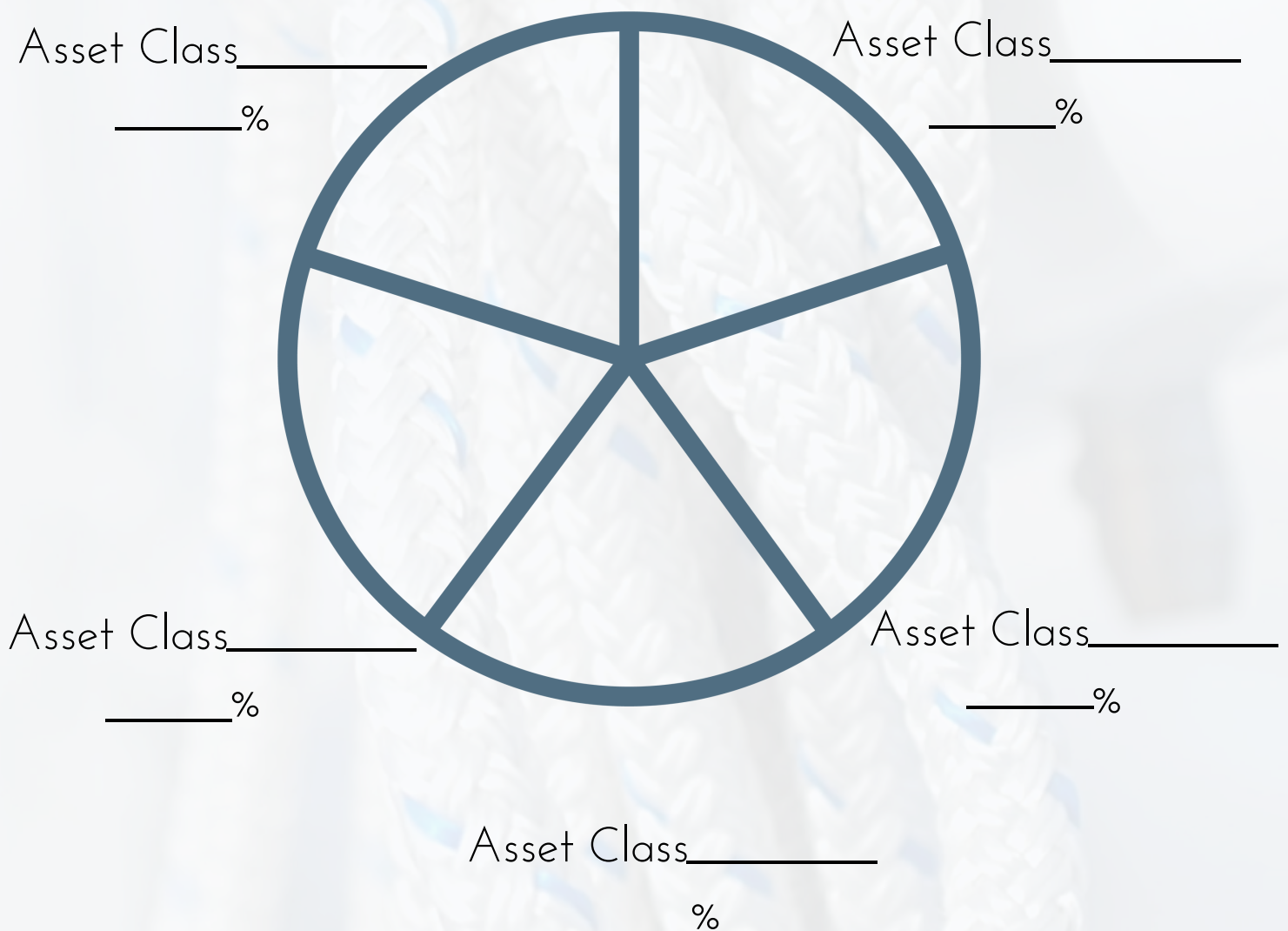
Capital Deployment Strategy

(How you intend to invest into these asset classes):

Putting Your Money To Work

The next step in your Life and Investment Thesis development is to assign an allocation goal around the asset classes you plan to develop that will deliver on your goals.

(Enter your asset class & percentage allocation goal below):



Asset Management Strategy

Now that you have defined your vision and mission, documented your financial goals and asset allocation strategy, your next step is to proactively manage your investment strategy.

Educational & Research Needs

(Conferences, podcasts, books, networking groups):

Due Diligence

(Check list, e.g. reviewing the Due Diligence Questionnaire):

Asset Management

(Platforms of your investments, weekly review plan, etc):

Legacy Transition

A legacy transition strategy is a clear and concise statement that outlines how an investor intends to pass down his or her investment strategy to family, charities, etc.

Your Exit Strategy & Liquidation Plan

(Enter each asset class below, add the timing of your exit and how you plan to pass on any assets to your heirs)

Money that comes easily disappears quickly, but money that is gathered little by little will grow

Proverbs 13:11



FROM BEQUEST

LEGACY BUILDER

CRAFT YOUR FUTURE,
ONE DAY AT A TIME



CONGRATULATIONS!

You have now completed your life and investment thesis plan and ready to put the plan in action! Most individuals give their life or investment plan over to someone else to create. You've taken the steps to define that plan for yourself and your family, and by doing so, have taken control of this one life that has been gifted.

FEATURES FOR THIS DAILY PLANNER:

Page 1:

The time slots allow you to list all your appointments for the day.

The Task List allows you to list all the errands you need to accomplish for the day. You want to avoid listing too many goals daily. In front of each task, you will find a square and circle. As you accomplish the project you have set for yourself during the day, check off the square box. For all tasks that need to carry over to the next day, check the circle.

Page 2:

On the next page, you have:

- Word of the Day:
- Write Promises:
- Targets:
- Your Journal:

The word of the day, will account for your daily battle cry. This will sum up your attitude for the day. Your written promises will serve as promises you make to yourself that you intend to keep. As for targets, think about all the people and things you will need to focus on during the day to get you closer to achieving your promises. Lastly, your journal will serve as your account for different experiences you take on during the course of the day.

Daily Schedule

Date: _____

6am: _____

1pm: _____

7am: _____

2pm: _____

8am: _____

3pm: _____

9am: _____

4pm: _____

10am: _____

5pm: _____

11am: _____

6pm: _____

12pm: _____

Evening: _____

Tasks:

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☐ Is for priority, check off the box when complete

Word of the day: _____

18

Targets for the day:

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