

Electronic Media Kit for *Plan Your Legacy, LLC*

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For more information, visit www.planyourlegacy.com or call Plan Your Legacy at (585) 419-2324.

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To whom it may concern,

What will you leave behind? It's not an easy question, but it's one that everyone will face during their lifetime. That's where legacy planning comes in: it takes financial planning and even estate planning to the next level by documenting an individual's personal values, life lessons, history, memories, final wishes, and more.

Mark Colgan, CFP® professional, is a leading expert on legacy planning. After the sudden loss of his young wife in 2001, Mark recognized the shortcomings of traditional estate planning. While he thought he had his estate plan in excellent order, he quickly discovered that it didn't address any personal or practical details.

Mark's experience convinced him that people are often unprepared for all the decisions they must make when a loved one dies. He saw the need for more formal ways to document our final wishes and important information, as well as the memories and personal values we want to pass on to future generations. As a result, he established Plan Your Legacy, LLC.

Plan Your Legacy's flagship legacy planning program, BreadcrumbsSM, is facilitated by certified legacy advisors across United States and Canada. The enclosed materials help explain the company's program, concept, and background.



Please feel free to contact me for more information, to see an online demo, or to set up an interview with Mark.

Sincerely,

Cathy Godlewski
Director of Public Relations



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For immediate release

New Program Helps Consumers Plan Their Legacies

Pittsford, New York – What do you want to leave behind? For most people, the answer to this question is much more than money – they want their legacies to involve personal values, life lessons, and more. Plan Your Legacy, LLC, is pleased to announce the release of BreadcrumbsSM, a powerful new legacy planning program that will help people document what they want to pass on to future generations.

In 2005, a landmark survey by global insurance giant Allianz found that when defining a legacy, baby boomers and their parents feel that the non-financial things an individual leaves behind are **10 times** more important to them than the financial ones. People place non-tangible assets such as personal values, life lessons, wishes, and beliefs far ahead of financial assets. Legacy planning goes beyond traditional estate plans, wills, and financial plans – it's the ideal way to preserve what's truly important.

Designed by leading legacy planning expert Mark Colgan, the Breadcrumbs program helps people determine and *document* what they want to leave behind. It's an easy, convenient, and secure way to record personal, practical, and financial information; memories; family stories; and more for the next generation.

Plan Your Legacy facilitates the Breadcrumbs program through trained professional advisors who have chosen to license the program. This comprehensive program includes legacy planning software, extensive training and marketing tools including *The Survivor Assistance Handbook: A Guide for Financial Transition*.

About Plan Your Legacy

Mark Colgan intimately understands the pressures and burdens that fall upon a surviving spouse-he lost his wife when she was only 28 years old. It was this personal tragedy, combined with over a decade of financial planning experience that led him to create Plan Your Legacy and a unique set of tools that are truly sensitive to the special needs of survivors. Plan Your Legacy helps people to examine and share their lives in ways like never before. For more information, visit www.planyourlegacy.com.





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Top 10 Reasons to Plan a Legacy

After extensive research, the team at Plan Your Legacy has developed a list of the *Top 10 Reasons people create a legacy plan*:

1. Influence the lives of your children and grandchildren by passing on what matters most: your values and life lessons, final wishes, most prized personal possessions, and financial assets.
2. Save your spouse or partner a lot of trouble, expense and frustration that often arise in the aftermath of death so that they can grieve properly.
3. Plan and record your legacy exactly as you envision it now while you're thinking clearly— not when an illness or health scare arises and emotions and sensitivities get in the way.
4. Let your wishes be known and feel comfortable knowing that your survivors will make better, more informed decisions—decisions that remain faithful to who you are and what you desire.
5. Relieve some of the administrative details by recording the location of critical documents (like your health care proxy, will, birth and marriage certificates, military papers, deeds, titles, insurance policies, tax returns, and account statements).
6. Avoid family disputes by making your wishes known – so you're leaving a legacy of fond memories, not problems.
7. Share your important personal and medical history details with your surviving loved ones.
8. Discuss your thoughts on end-of-life celebrations and/or memorials.
9. Make sure your family traditions and values continue to be preserved for generations.
10. Express one more "I love you" after you're gone ... deliver one last letter after your death reaffirming your love, sharing memories, and relishing milestones of your life together.





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Company Background: Plan Your Legacy, LLC

Plan Your Legacy, LLC was established in 2003 by Mark Colgan, CFP[®], who wanted to make a difference in people's lives and in the lives of their survivors. Mark intimately understands the pressures and burdens that fall upon a surviving spouse—he lost his wife when she was only 28 years old. It was this personal tragedy, combined with over a decade of financial planning experience, that led him to create Plan Your Legacy and BreadcrumbsSM, a unique program designed to help people preserve their personal legacy.

The company's flagship program, BreadcrumbsSM, makes it easy for individuals to share their life lessons, values, and memories with the next generation. It's also an ideal vehicle for passing on practical details such as final wishes, medical history, financial information, and even instructions on how to care for children and pets.

To assure proper implementation, the legacy plans are facilitated through the company's network of licensed legacy advisors. As a result, individuals receive personal service and are able to examine and share their lives in a way like never before. In summary, Plan Your Legacy helps compassionate advisors deliver meaningful and profitable legacy planning services that ultimately enhance the lives of their clientele and future generations.

Vision & Mission

Our vision is to revolutionize the financial services industry by making legacy planning an essential part of any client's plan. As the leading authority, Plan Your Legacy will be the premier provider of legacy planning consulting, products, and services.

Our mission is twofold: 1) to empower individuals to create a legacy plan that preserves their life values and positively influences the lives of their survivors, and 2) to help financial advisors foster deep, loyal, multigenerational relationships with their clients via unique tools, training, and presentations.

Clients

Plan Your Legacy's clients include private wealth consultants, national and regional brokerage firms, mutual fund companies, money management firms, insurance companies, and banks. Our clients have included UBS, American Express, Ensemble Financial Services, Capitas Financial, LLC, AM&M Financial Services, and The Legacy Companies.



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Company background...continued

Our Solutions

Plan Your Legacy's program helps professional advisors to empower clients to articulate, create, and implement legacy plans that ultimately help preserve life values and final wishes. These tools are packaged as part of the new Breadcrumbs legacy planning program that is facilitated by certified legacy advisors. With the proper training and tools, your advisor will help you create a legacy plan that documents your life lessons, family values, precious memories, and important details such as final wishes, personal and medical history, and financial and insurance information. Your legacy plan also includes practical, everyday details—computer passwords, pet care instructions, and an address book of important contacts. You can even proactively create personalized online memorial pages, a list of inspiring goals, and messages to be sent to your loved ones on a specified date after your passing. All of this is delivered with the help of your trusted advisor.



Personal Profile



Mark Colgan, Founder and CEO
Plan Your Legacy, LLC

In 2001, Mark Colgan was a successful Certified Financial Planner™ professional who'd been married to his best friend, Joanne, for seven years. When she died unexpectedly at the age of 28, Mark's wonderful life was dramatically changed forever. In his words:

Within minutes of her passing, I found myself in the midst of a crowd of emergency medical technicians, firemen, policemen, relatives, neighbors, and the medical examiner. Within hours of her death, I was writing her obituary, selecting her casket, planning the details surrounding her funeral, purchasing a gravesite for both of us, and even designing her headstone. Within six hours, I had gone from waking up with my wife to beginning the process of burying her.

And aside from the paperwork, legal details, and planning, Mark was dealing with emotional issues – what about Joanne's final wishes ... her life story ... her values?

Inspired by the challenges he faced as a young widower, Mark authored *The Survivor Assistance Handbook: A Guide for Financial Transition* in 2002. The following year, he took his idea a step further and created a personal legacy journal for individuals to use to establish a record of their lives and final wishes. It was also in 2003 that Mark founded Plan Your Legacy, LLC and began national speaking tour on the important topic of legacy planning. **Plan Your Legacy helps compassionate advisors deliver meaningful and profitable legacy planning services that ultimately enhance the lives of their clientele and future generations.**

Today, Mark is a sought-after national speaker and trainer. His articles have appeared in many industry magazines and he has also been cited by US News & World Report, Forbes, CNBC, and other national media.

On a personal note, Mark and his current wife, Kathy, have two young children and live in Pittsford, New York. Mark is also the founder and president of Colgan Capital, LLC, an independent financial services firm that specializes in serving the unique financial planning needs of families, widows, widowers, and domestic partners.

