# Legacy & Lifestyle Refinement Case Study & Playbook

*Simplify, thrive, and leave a legacy that matters*

## ELEANOR – REFINING LIFE AND LEGACY

### The Scenario

Eleanor has lived in the same home for decades and is financially secure, but she's beginning to think about simplifying her life. With adult children and grandchildren, she wants to ensure her plans reflect not just her wealth but her values.

She wonders whether to downsize or move closer to family, how to create a giving plan that lets her see the impact during her lifetime, and how to make sure her children understand her wishes. More than anything, she wants clarity and simplicity—for herself and for those she loves.

### How Sanctuary Could Help

- Develop a Statement of Financial Purpose to capture the legacy she wants to live and leave
- Evaluate housing and lifestyle options that support her health, happiness, and connection to family
- Review and update estate and legacy plans to ensure they reflect what matters most
- Explore tax-efficient giving strategies through a donor advised fund (DAF) or direct charitable distributions that allow her to witness the impact now
- Facilitate family conversations to help Eleanor share her values and engage her children and grandchildren in meaningful ways about inheritance and end-of-life wishes
- Simplify her financial structure to reduce complexity and create clarity for her and her family
- Provide investment management focused on simplicity and income generation rather than growth
- Create systems to ensure her financial decisions remain clear and manageable as she ages

IF THIS SOUNDS LIKE YOU:

### Legacy & Lifestyle Refinement Essentials

- Align wealth with values and create meaningful impact during your lifetime
- Simplify finances for clarity and ease—for you and your loved ones
- Strengthen relationships and community connections that matter most
- Live fully and joyfully while preparing those you love for the future

### Why Legacy & Lifestyle Refinement Matters

You've earned the right to live fully. This stage is about ensuring your wealth supports your joy today while securing the legacy you want to leave tomorrow.