

THE ~~TRUST REVEAL~~
Kitchen Table
Reveal Stater Kit

*3 things your future executor wishes you'd leave them —
before anything happens.*

SAGEVAULT

*Because most of us won't get a \$100M trust reveal...
but we can leave our loved ones something even
better: direction.*

“Where everything is” list

Not fancy, just one clear page that answers:

- Where your will/trust is stored
- Where your important documents live (ID, insurance, property records)
- Where your financial accounts are (just categories, not numbers)
- Where the house key/spare key is
- Where to find your important sentimental items
- Where your passwords/digital access instructions are stored

Think of this as the map your loved ones need — not a scavenger hunt.

Your “After I’m Gone” Letter

Not legal.

Not formal.

Just human.

This short letter tells your people:

- What you want them to know
- What you don’t want them to worry about
- Any clarifying notes about items or wishes that could cause friction
- A message of love, gratitude, or humor — the things that matter most

This letter prevents more arguments than any will ever will. (Siblings can argue with each other. They rarely argue with your words.)

This is where your heart lives. Your will handles the logistics.

Your “First Call” List

When someone dies, the first 24–72 hours feel like a blur. A simple list helps your executor know exactly where to begin.

Suggested categories:

- Who to notify first (family, friend, pastor, etc.)
- Who to contact professionally: Attorney, CPA, Financial advisor, Funeral home (if preferences exist)
- Who not to call yet (A legitimately helpful instruction!)

Add short notes like:

- “Call my sister after you’ve talked to Mom.”
- “Please don’t post on social media.”
- “If the dog is alive, James has first rights.”
- “Do NOT let my cousin Carl take anything from the garage.”

A tiny bit of guidance prevents giant misunderstandings.

Need Help Filling the Gaps?



What SageVault Does Differently

I bridge the gap between meaningful conversations and effective action—turning intentions into clear, organized plans your family can rely on. I'm your partner through the entire process, helping you navigate with clarity and confidence.

Lawyer Prep — Starting From Scratch

Build a strong foundation before you ever enter an attorney's office.

Transform insights into an actionable plan • Prepare confidently for legal meetings • Organize accounts, assets, and documents • Strengthen family communication and expectations

Executor/Trustee Playbook — Setting Your Most Trusted Person Up for Success

Clarity today. Confidence when it matters.

Review & understand the current plan • Identify risks, gaps, and conflicts • Coordinate updates with the right professionals • Translate wishes into clear, accessible instructions • Protect relationships through healthy communication

Family Alignment Program — For Complex Situations

Bring clarity, structure, and peace to emotionally charged decisions.

Facilitate guided family meetings • Navigate dynamics with neutrality • Address fairness concerns openly • Reduce confusion and prevent future conflict

*Schedule your free 30-minute Legacy Planning Consultation
at mysagevault.com*

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*Clarity is a gift we leave for the
people we love.*

SAGEVAULT

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