# Live Like You're Living: Adultier Legacy Planning for Entrepreneurs with Colleen Watson

with Colleen Watson · Hosted by Kathi Burns, CPO®, Business FLOW Strategist

Colleen Watson is a former librarian who founded Century Plant Business Services after her mother's serious fall in April 2024 made her a full-time caretaker without a plan.

- [ ] List every online account you have that uses a password.
- [ ] If the list is long, move your passwords into one password manager.
- [ ] Give a trusted person the master password to your password vault.
- [ ] Write a "where is it" list for your will, retirement papers, safe deposit box key, birth certificates, passports and credit card information.
- [ ] Build a phone tree of everyone you want told if something happens, beyond your emergency contact.
- [ ] Note how much each person on your phone tree should be told.
- [ ] Write down any promises about who stays in a home, and make sure the people affected know.
- [ ] Schedule "the talk" with your adult children and your parents about what they want to happen.

Listen, read the transcript and get the links: addspacetoyourlife.com/podcast/legacy-planning-for-entrepreneurs-colleen-watson/
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