



My Story in Trusted Hands

By Glen Cone

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To learn more about Generation Preservation, order additional copies, or to request a presentation, please contact Glen Cone at gccone@lincolninvestment.com

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Dedication

This book is dedicated to my Dad,
Richard H. (Dick) Cone, who showed me the working
tools of life and taught me how to use them.

Please accept this booklet as a heartfelt gift for you and those close to you. We hope it will help you share your story with key people in your life, because Generation Preservation is about preserving your story.

Clear instructions on how you want your personal and legal affairs handled can make it less difficult for those who must take care of them. The ability to easily contact professionals, friends, and loved ones can make things much easier.

If stories about heirlooms, antiques, and personal possessions are lost, and if there is no clear road map of what should be done, these gifts of love can become a major source of confusion and stress, instead of valued treasures infused with loving memories.

Most importantly, your intangible gifts and stories about individual accomplishment, family values, and important anecdotes can be lost forever.

When you write down personal information, important people in your life will know and remember what's significant to you. Generation Preservation ensures that your story is **preserved** so it can be cherished by future **generations**.

Dear Family & Friends,

The information documented in this book is a “key” intended to make life easier for those taking care of my personal matters. It is meant as a road map to direct you to my wishes, and the information and memories I wish to share. This does not supersede any other legal documentation and is not a legal document. It is my desire that you have this information to assist you in making decisions on my behalf.



This story belongs to

Family History

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Clarify where you've been,
so others will know where to go.



Important Values I Would Like to Share

Memories I Would Like to Share

How deep are your roots?

Jewelry

Item

Location

Beneficiary

Antiques

Item

Location

Beneficiary

Heirlooms

Item

Location

Beneficiary

Preserve your family tree.
Inventory what's important.



Investments

Investment Type_____

Investment Company_____

Contact Number_____

Account Number _____

Investment Type_____

Investment Company_____

Contact Number_____

Account Number _____

Investment Type_____

Investment Company_____

Contact Number_____

Account Number _____

Investment Type_____

Investment Company_____

Contact Number_____

Account Number _____

Comments

Important Names & Numbers

In case of emergency call _____

Business attorney _____

Financial Professional _____

Estate Planning Attorney _____

CPA / Accountant _____

Insurance Advisor _____

Trusted Contact _____

Important Names & Numbers

Banker _____

Medical-Primary _____

Veterinarian _____

Miscellaneous _____

Personal _____

It's your legacy. Preserve it well.

Retirement Benefits

Employer Pension

Monthly Pension _____

Benefits Contact _____

Contact Name _____

Employer Name _____

Employer Address _____

Type of Plan _____

Account Balance _____ Date _____

Host of Plan _____

Beneficiary _____

Personal Comments

Military History & Benefits

Name_____

Rank _____

Branch of Service _____

Years Served _____

Identification Number _____

Benefits Contact Number _____

Personal Comments

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My Favorite Charity

This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

I left a footprint here.



My Documents

	Location	Contact
Birth Certificate	_____	_____
Driver's License	_____	_____
Living Will & Testament	_____	_____
Llving Trust	_____	_____
Deeds to Real Property	_____	_____
Power of Attorney	_____	_____
Health Care Proxy	_____	_____
Taxes	_____	_____
Marriage License	_____	_____
Divorce of Separation Agreement	_____	_____
Life Insurance Beneficiary Form	_____	_____
Military Discharge Papers	_____	_____
Burial Agreement	_____	_____
Support Agreement	_____	_____
Custodial Agreement	_____	_____
Minor's Trust	_____	_____
Guardianship	_____	_____
Auto Registration	_____	_____
Auto Title	_____	_____
Auto Insurance	_____	_____
Organ Donor Card	_____	_____
Personal Comments	_____	

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

In the Event of My Death

Burial Arrangements

Funeral Home _____

Location _____

Phone Number _____

Cemetery _____

Tombstone Engraving _____

Eulogy to be Given by _____

Obituary Reading _____

I would like to have the service performed by _____

How do I want future generations
to remember me?

In the Event of My Death

I would like the following music to be sung _____

I would like the following poetry read _____

I request the following Scriptures to be read _____

Please notify the following people of my death _____

Additional information I think is important to know _____

Glen Cone



The premise for writing *Generation Preservation* came from appreciating deep family roots and valuing the things and people we'll never get to know.

Growing up in a small town with a rich history, Glen has been given a great perspective for this project and a deep sense of core family values. His ancestors moved to rural Upstate NY in the early 19th century and have remained at the same location for several generations - more than 175 years.

Preserving and protecting much of that history has been a futile effort, as most of it cannot be reclaimed and therefore is lost. Like many of us, no one took the time to write things down, yet each of us has a personal story to leave behind. Anyone that's ever lost a loved one, had to untangle personal information, or liquidate and distribute an estate, understands the value of having a guide to follow when making decisions for those unable to do it themselves.

It should be understood that completing this book is not for the person writing it; but for those we love and care about, who we will sadly, one day leave behind.

Glen's professional passion is working with clients to help work towards preserving, protecting and growing their assets for themselves and future generations.

He is an independent financial advisor with an area of concentration in retirement and wealth transfer planning. Glen has a passion for working with Seniors and their families at significant milestones in their lives. He currently holds both life and long term care insurance certification and is FINRA series 66 and 7 registered.

He is an active member in his church, and a Free and Accepted Mason.

Glen earned his BA in Sociology from East Stroudsburg University in Pennsylvania and is a Dale Carnegie graduate. He lives in Ontario, NY with his wife Linda.

What legacy can I pass on?