

# Legacy Travel Fund

This gift of travel in the amount of

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is being given to

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*(Name of Family Member)*

Gifted by: \_\_\_\_\_ Date: \_\_\_\_\_



## CHECKLIST

# Family Travel Trust

		Yes/No
1.	The trustee has established <b>terms and activation requirements</b> of the Family Travel Trust Fund.	
2.	A <b>monetary value</b> has been established for each travel experience.	
3.	<b>Destinations and a timeline</b> have been determined for the age and education level of each beneficiary.	
4.	Pre-departure family <b>meetings</b> have been scheduled.	
5.	Beneficiaries have <b>met with/been involved</b> in travel decision-making with our selected travel advisor.	
6.	Plans have been made to incorporate informal discussions during each trip to <b>maximize potential</b> of each travel experience.	
7.	<b>Post-trip follow-up</b> family meeting have been discussed for the beneficiary to share his/her travel experience.	
8.	Family members are aware of <b>personal safety and cyber security risks</b> when traveling.	

## How to Use Legacy Travel Trust Certificates:

- Any family member or members may be the grantor of a Legacy Travel Trust Certificate. It is not necessary to assign a dollar amount since in many instances, the Certificate will not be used until the recipient reaches a certain age or stage in life (e.g. college graduation).
- When meeting as a family, involve all family members in developing a set of rules around family-financed travel. (Who is eligible? How often may it be used? Purpose of travel? What's included and not – gifts, entertainment, etc.?)
- Families may on occasion, want to travel as a family. It's a wonderful opportunity to spend time together. Discuss possible family travel locations and the reasons why. Allow family members to contribute to the experience by selecting a venue or activity each would like to do.