



Family Legacy Binder

Where your family comes from, what matters to you, and what you intend for the people and things you leave behind.

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If you only read one page

The things families regret losing are rarely money. They are the stories, the recipes and the reasons behind the heirlooms. Start with these.

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- 1 **Record the oldest relatives first.** Ten minutes of phone video with a grandparent is worth more than any family tree website. Stories go with the person.
 - 2 **Label your photos.** Names, year and place. Unlabeled photos become strangers within one generation.
 - 3 **Say who gets the meaningful things, and why.** Families rarely fight over the money. They fight over the ring, the clock and the recipe box.
 - 4 **Connect the list to your will.** Many states let a will refer to a separate signed list of personal items. Ask your attorney if yours does.
 - 5 **Write down the family health history.** Conditions in parents and siblings can move your own screenings years earlier. Share it with your doctor.
 - 6 **Write the letter.** What you believe and what you hope for them. It has no legal force, and it is often the page people keep longest.
 - 7 **Keep originals safe and copies shared.** Scan photos, letters and recipes, and give a copy to more than one person.
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Then start here: **Family tree**, page 5.

What is in here

7 worksheets in two sections. Start with the first section, then whichever page someone is about to ask you for. A page filled in roughly is worth more than a blank one.

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01

Family history

The tree, the stories, the traditions, and the health history.

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Family tree

Names, dates and places, as far back as anyone remembers. Ask the oldest relatives first, and write down who told you.

Name	Relationship	Born (date and place)	Died (date and place)
	Me		
	Father		
	Mother		
	Father's father		
	Father's mother		
	Mother's father		
	Mother's mother		

Where family records are kept (Bibles, certificates, papers) _____

Family research account or DNA test kept by _____

Stories to keep

The stories that get told at every holiday, before the details are lost. Write them the way the person tells them.

Where did the family come from, and why did they move?

What did your parents and grandparents do for work?

What was the house you grew up in like?

What was the hardest time the family went through, and how did you get through it?

How did you meet your partner?

What is a story about you that your children should know?

What do you wish you had asked your own parents?

Recordings or videos of these stories are kept at

Traditions and recipes

The dishes, holidays and habits that make your family yours, written down so someone else can carry them on.

Tradition or holiday	What we do	Who started it

Family recipes

Recipe	Whose it was	Where the written copy is

Cook it together once. Most family recipes say a handful or until it looks right. Watch the person make it and write down what they actually do.

Family health history

Conditions that run in the family, so doctors can screen earlier. Include parents, grandparents, brothers and sisters.

The full guide: hubstone.com/guides/family-medical-history

Relative	Condition	Age when it started	Notes
	Heart disease		
	Stroke		
	Diabetes		
	Cancer (type)		
	Dementia		
	High blood pressure		
	Mental health		

Tell your doctor. A parent or sibling with heart disease or certain cancers at a young age can move your own screenings years earlier.

02

Intentions

Heirlooms, a letter to the family, and the causes you support.

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Heirlooms and intentions

What each meaningful item is, where it came from, and who you intend it for. It prevents hurt feelings later and tells the story behind the object.

The full guide: hubstone.com/guides/the-will-conversation

Item	Its story	Where it is	Intended for

Make it official. A list like this shows your wishes, but it may not be binding on its own. Ask your attorney whether to reference it in your will.

Photos of these items are kept at _____

A letter to the family

What you believe, what you hope for them, and what you want them to remember. Some families call this an ethical will. It has no legal force, and it is often the page people keep longest.

What matters most to you, and why?

What lessons did life teach you that you want to pass on?

What are you most proud of?

What do you hope for each of your children or grandchildren?

Is there anything you want to say that you have not said?

Written by _____

Date _____

Giving and causes

The causes you support now, and what you would like to continue after you are gone.

Cause or organization	Why it matters to you	Yearly gift	Continue after?

Charitable gifts written into the will or trust _____

Memorial donations instead of flowers, to _____

This does not have to stay paper

You have just written down the things your family would otherwise have to work out under pressure. Keep this binder somewhere two people know about, and tell them it exists.

Paper goes stale. A phone number changes, a policy renews, a parent moves, and the page you filled in last spring is quietly wrong.

Hubstone holds the same record and keeps it current. Enter something once, and share each page only with the people who should see it. When a detail changes, the record changes with it, and the reminder comes before the deadline. The Family Legacy Binder is free, on paper and in the app.



Fill it in once

Scan to start at hubstone.com/start. No card needed.

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