



Your Family Legacy Plan

First, you do not need to be a “techie” person to complete any task in this guide!

What you’ll learn in this guide:

- Getting Started
- Creating your Legacy List
- What Equipment Do You Need?
- Organizing the Memories
- Starting the Conversation about Memories
- Lights, Camera, Action
- Location, Location, Location
- Interviewing Tips
- Getting Started with Three Questions
- Aaaaand Action!
- Storing the Memories
- Creating a Backup to Your Backup

Each activity will be given:

- ✓ A difficulty scale
- ✓ Time needed to complete
- ✓ Resources needed (Equipment, People, etc)

One last thing, you're not alone. If you are stuck, you have a question, or you have feedback, please email me at Bethanie@JoinMemento.com or call me at 866-831-9888.

I am proud of you taking the first important step to capturing your legacy and the legacy of your loved ones.

Thank you for trusting me to go on this journey with you! You ready? Let’s go!

Bethanie



866-831-9888



info@JoinMemento.com



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Difficulty (0-5)	★ - Piece of cake
Time Needed	2 minutes
Resources Required	None

Getting Started

First, let's talk about why does this even matter?

It is quite easy to take each day for granted! It seems like time passes so quickly these days and we have less and less time with the ones we love the most.

This is something that I wish I had when my Mom was still with us.

These questions can be light and fun or become very deep. What matters most to me, is having a deep understanding of the experiences that my loved ones had.

- ✓ What were their dreams?
- ✓ Who influenced the most?
- ✓ What was the happiest time of their lives?
- ✓ What would you tell your 20 year old self?

These are things that you may know but in most cases we learn things that are simply profound about people we see all the time.

Choose just a few questions from the [Family Legacy Questions](#) document that really speak to you and have at it.

Make it fun.

Make it memorable.

Make it history.

Build and capture your legacy today!



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Difficulty (0-5)	★★ - Not hard
Time Needed	15 minutes
Resources Required	Just your brain

Legacy List of Loved Ones

Now that you have a few questions in mind, let's find the people!

We are going to break this down into a couple of easy bite sized steps.

Step 1: Make a list of everyone

Get out a blank sheet of paper; open your laptop or notes on your smartphone. Write down everyone in your family you would like to talk to. Don't worry about if you don't know how to find them. Just write down everyone that you can think of that matter to you or even people you would just loved to know more about them and their life.

Step 2: Prioritize

Now, we are going to group people into two categories. The first category is the most important and should be the first people you speak with. The secondary list will be the people that are still important but the conversation is not as urgent as the most important list.

Urgent Important Peeps

Elderly - Great Grands, Grandparents, Parents or Guardians

Dementia/Alzheimer's - Anyone in the early stages of memory loss or brain trauma

Illness - People living with chronic or severe illnesses at any age. Many physical illnesses often affect memory as people deal with pain and are unable to focus on other things.

Veterans - Often times, war is deeply traumatic. The affects of war wreck havoc on healthy brains. Capture what you can now before chunks of their lives are forgotten forever. This process has been healing for our vets and their families too!

Important Peeps

Family - Parents, siblings, children (grown), or distant family

Friends - People that have played an important role in your life and their life experiences matter and are something you wish to capture.

Don't limit this to just family. Think of anyone that has mattered to you or help shape you in who you have become.



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Difficulty (0-5)	★★★★ - You may not like me
Time Needed	30 minutes
Resources Required	Time, Money (maybe), Patience

Capturing the Memories

Told today...gone tomorrow

My long-term memory has been destroyed by technology ADD! I don't know if this is a proven fact or not but I think my memory has gotten much worse with the advent of smartphones, tablets and always-connected-to-a-screen-it-is.

If you are going to have an important conversation with someone that explains their life, their history and what experiences taught them the valuable lessons that shaped them, then, you will want to have a way to document that conversation.

My #1 preferred option is video on my Smartphone! Most of us have a high definition, high quality camera in the palm of our (smartphone) hand. So, use it! I have added a few other options that are free or really inexpensive.

Here are a couple of ideas for you to make sure this conversation is safe for years to come.

FREE OPTIONS

Old school - pen and paper (no audio or video)

This is always a good standby but unfortunately people talk faster than we can write, so you will miss something if you are going to transcribe all their answers. This applies to typing the answers too, in my honest opinion. Plus you can't really listen.

Computers/laptops (just audio)

Most computers let you record from the computer speakers in a software program. To do this, you can use your computer microphone. The computer microphone will not be the best quality, so make sure the computer mic (google where it is on your model of computer) is close to who you are interviewing so the computer can pick up the answers clearly. You can test it by yourself to see if the computer picks up the sound well. You can use an external microphone too, see below.

Mac - Use QuickTime to record from your computer. [Click here for instructions.](#)

Windows - Use Sound Recorder to record from your computer. [Click here for instructions.](#)



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Capturing the Memories - continued 1

****MY FAVORITE ** Capturing Video on a Smartphone or tablet (full video)**

Most of us have one of these. And most of them have many free apps that you can download to record your voice. Word of caution, these recordings will be stored on smartphone or device, so the file will take up storage space. So, if you don't have any space on your phone, you may have to delete some files (apps, photos, videos) to free up space so you can record the videos you want to capture.

If you are going to use a smartphone to record, invest in a smartphone tripod. Not a selfie stick but a tripod. The tripod will sit nicely and you will not need to hold the camera still and look at questions and do way too much at one time. They cost about \$10-\$20 USD and there are tons online to choose from. [Great one from Amazon](#)

If you already own a tripod, you can get a cellphone holder attachment, which will go in the same slot a camera would on your tripod. [Just the clip for your tripod Amazon](#)

OPTIONS THAT REQUIRE MONEY

Digital tape recorder - \$30

You can grab these on Amazon or at Best Buy. I found one on Amazon for \$30, which holds up to 1,100 hours of recording. At some point, you will want to get the conversations OFF the recorder and stored on the cloud for safe keeping. Make sure you tell somewhere where these are stored/saved or kept. [Quality recorder Amazon.](#)

External Microphone - \$40

If you are going to use your computer to record, the computer microphone may not provide the best quality. You can get a fairly high quality external microphone for not a lot of dough. They are easy to use and they just plug into your USB port on your computer.

[External Mic on Amazon](#)

A lavalier microphone is the small mic that clips on your clothing. The other mics can sit on a small stand (for a table or desk) and is just freestanding. Don't forget, you will need to set it close to the person. I love this one but make sure you turn it off.

[Lavalier Mic \(SmartPhone\) Amazon](#)

[Lavalier Mic \(Computer\) Amazon](#)



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Capturing the Memories - continued 2

I know this was a doozy but I think if you are going to go through the effort of doing this, then it is worth mentioning how you can capture it all electronically.

This is a great family project. You can use other family members that are artsy or creative and enlist them to help. Same thing goes if you have a techie person that can just seem to figure things out. You can ask them for help too. Make it a family affair and reduce your stress over the whole thing.

This is meant to be an enjoyable experience. It should be about creating a deeper connection with your loved ones. Learning things you never knew and creating a legacy for your family that will be around for many, many years to come.

It's not about the destination; it's about the journey!

I am sure someone famous said this but I can't find who.

I am sorry if this made your eyes glaze over, then we can help. Just email me at Bethanie@JoinMemento.com and let me know where you are stuck or what is confusing and we will do our best to clear it right up for you.



866-831-9888



info@JoinMemento.com



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Difficulty (0-5)	★★ - Not hard
Time Needed	15 minutes
Resources Required	Just your brain

Organizing the Memories

Before you go all crazy capturing memories, let me share a system so you don't create a junk drawer before you get started.

This is super easy to do if you set yourself up before start to store everything in your special, safe location.

Step 1 – Create folders for each person

If you are creating legacies for 3 people, create 3 folders:

Person 1 Legacy

Person 2 Legacy

Person 3 Legacy

ProTip: Setup an account with [Google Drive](#). It is free for 15GB (when this was written) and you can do a bunch of cool things. You can share the folders with people and you can make sure that someone will have access to it if something happens to you with a [Google Inactive Account Manager](#).

Step 2 – Place memories in the right place

If you are interviewing Person 1, place all of their files in the Person 1 folder. And so on.

Optional – Create folders for special occasions

If you have a special occasion, like a grandparents anniversary party, create a folder for that event. You can ask people to share stories at the event or they can record a special message talking about seeing, meeting or being around your grandparents. Maybe what your grandparents taught them about life or love. Or maybe the impact your grandparents had on them.

This is MUCH easier to do upfront than after the fact. Don't let these files become a junk drawer that you don't want to ever clean.



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Difficulty (0-5)	★★ - Not hard
Time Needed	60 minutes
Resources Required	Time with a dash of patience

Starting the Conversation

Why can't family just be easy?

Come on, what would be in the fun in an easy going family?

Often times, we have the best of intentions with so many things but then life gets in the way. Not many of us have a bunch of have free time but make the time, pretty, pretty please.

If you are having a hard time connecting with long lost family members or shall we say...difficult people, then here are a few tips that may make connecting easier.

Connecting with the un-connectable

There are 6 basic human needs and we all have one that is **more important** than the others. They drive almost everything we do and think about. They are:

- Love & Connection
- Certainty
- Uncertainty
- Significance
- Growth
- Contribution

Think about the person for a moment and ask yourself, “What is important to them? “

Since we all have one dominant need that is more relevant to us than the other 5 needs, to establish a real connection, appeal to their primary human need first.

Here are a few examples:

If the family member I am trying to connect with has a primary need of contribution, then I would appeal to how much their contribution to this project means to me or our family.



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Starting the Conversation – continued

If there primary need is significance, then I would emphasize how important their stories and experience is to our family for years to come.

You are not being dishonest, you are just trying to relate things in terms of what matters to them, not you.

Remember the whole point of this exercise is to learn more about them but not everyone may feel that is important or a good use of time.

Pro Tip: Start with someone easy, think about who loves to talk about their life and their stories. They will most likely be thrilled to answer your questions. And you will get your feet wet in your new interviewing role and get comfortable with the process.

Here are a couple of conversation starters:

- This year we have decided to create (time capsules) or (video photo albums) and I would like to ask you a couple of questions. Is that cool?
- This super amazing person I know, Bethanie, (OK, you can take my name out) told me about recording her Mom telling stories about her life and I would like to do that for our family. Can I count you in too?
- Hey, I am trying to remember that story you told me about... would you mind telling me again? This time I would like to video tape it so we have it for later and I don't forget it again.



Difficulty (0-5)	★★ - Not hard
Time Needed	15 minutes
Resources Required	Just your brain

Location, Location, Location

Before you start the interview, we need to find the best place to shoot. There are a few things to consider when finding the perfect place. Here are a couple of ideas of places to capture your stories.

Kitchen

I like kitchens. They normally have great lighting (bright or recessed) but not the best seating for long times.

Formal Dining Room

More comfortable seating for sure but may not have good lighting.

Special Room

I like shooting in rooms that have sentimental value. We always congregate in the kitchen in our home. We have a ton of memories in that room. Is there a special room you can record in that has sentimental value?

Do some tests in different places in the house before you have to interview your loved one. That is one less thing you have to do on interview day.

ProTip: Windows can be your best lighting friend at the right time of day. Not when the sun is glaring in the window and is blinding but any other time. If you have to, follow the sun around the house to get good light.

Things that may cause problems:

- Windows – Watch the glare from the windows, it can be hard to see someone's face the sun is beaming in the window behind them.
- Echos - Depending on the microphone you are using, windows can cause an echo. Also, a room with a high ceiling can also cause an echo. Please check your sound with a test video BEFORE shooting an hour of interviews.



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Difficulty (0-5)	★ - Easy as pie
Time Needed	Depends on your diva level
Resources Required	See above

Let's get ready for Lights, Camera, Action!

The day is fast approaching to shoot your video. Here are a couple of tips for your interviewee to help make this process less stressful, and maybe even a little fun!

Gentlemen

- No makeup required! *Kidding.*
- No patterned, busy prints or green clothing
- Solid colored shirt, button down would be great

Ladies

- Makeup
 - o Foundation/concealer – You can go to town with this one. You can wear a couple of layers of foundation. It will not show up on camera. What does show up on camera, that is often hard to see with the naked eye, is blotchy skin. So, pile it on ladies!
 - o Blush – don't go crazy but do make sure you have a tad of blush or bronzer on your cheeks. If you are really good, you can contour but don't try it for the first time on the day of the shoot.
 - o Eye makeup – Don't go too dark, no jet black or dark browns. Smoky eyes are fine but not too goth, otherwise it will be hard to see your expression in your eyes.
 - o **ProTip: Take the worry off of yourself and schedule a free makeup session at your local department store. You'll look fabulous and you'll feel like a million bucks.**
- No patterned clothing
- Solid colored shirt
- No green colors
- No necklaces (it could interfere with the microphones)

That's it. I am excited for you! Have fun and enjoy your day as a movie star!



Difficulty (0-5)	★★ - Not hard
Time Needed	15 minutes
Resources Required	Just your brain

Interviewing Tips

Before you get started, here are a couple of quick tips!

1. This interview is not about you. As much as you want to be a part of the conversation, try to restrain yourself and just listen.
2. Don't rush them. Some of the questions you are asking may take one a while to think about them. Give them time. No offense men, but men may take more time and thought before answering something, whereas, women I have interviewed tend to answer faster.
3. Give them a moment after they have finished answering the question and ask them, "Is there anything else you would like to add?"
4. When shooting with a tripod, raise the camera or smartphone a bit above eye level, not at eye level. It helps the ladies look better and magically makes double chins disappear.



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Difficulty (0-5)	★★ - Not hard
Time Needed	15 minutes
Resources Required	Just your brain

Starting with 3 Questions

Let's start here with these 3 questions. These questions are meant to give you a deep understanding of your loved one.

What are the most important lessons you have learned?

What advice would you give your 20 year old self (about love, life, failure, or anything else)?

If you could change anything, what would you change?

If you don't like these questions, check out a full list of questions on our [website here](#). Also, you can ask the person you are interviewing too...just a thought.



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Difficulty (0-5)	★★ - Not hard
Time Needed	60 minutes
Resources Required	Time with a dash of patience

Aaaaand Action!

OK, the big day is here or coming up. And here is a quick checklist for you to make life easier.

Make sure you have confirmed the date and time with the person you're interviewing.

- Remove any unnecessary videos, files from your smartphone or camera
- Charge your phone or camera. And bring plug chargers for everything with a charger. You may also want to bring a power strip (surge protector).
- Bring your equipment (tripod, smartphone clip, etc) and don't forget your questions.
- Check lighting and location before starting if possible
- Check your sound with a test video or recording BEFORE recording a full interview
- Be patient and don't rush the answers.
- Have fun and enjoy this moment, you may be making history for your family.

One last thing, you are not alone. If you are stuck, you have a question, or you have feedback, please email me at Bethanie@JoinMemento.com or call me at 866-831-9888.

Difficulty (0-5)	★★★★★ - The worst part
Time Needed	60+++ minutes
Resources Required	Time with a boatload of patience

Storing the Memories

Don't lose what you have started!

All your hard work...should be safe.

Depending on what method you used, you now have the challenge of saving the stories you have gathered.

In this email, I am going to lay out a few free options for you to explore.

Here's the problem with Pen & Paper

I love to write. I have written down everything. And I have journals from many, many years ago. And my Mom did too but you know where they are? In boxes in the attic.

If something happened to me, my kids would have no idea where to find these amazing stories. Don't let that happen to you.

If you used pen and paper, you can make sure it doesn't burn up in a fire or get stolen from a secure vault. You can buy a fireproof safe or safety deposit box.

I am a big fan of digitizing everything. And it is not as hard as you may think.

You can totally do this! Ready?

Here is an easy way to take your physical paper stories and transform them into digital magic:

Step 1: Take pictures of the pages on your smartphone or tablet.

You can save each piece of paper with a picture. You want to make sure once you save the image, you rename the file with something that makes sense (vs what the phone names the photo 201612290 – like this picture name makes any sense).

- Page 1-5. Grandma Della Family stories (page 2, page 3, w/story details, etc)
- Page 1. Papa World War II stories



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Storing the Memories continued 1

Step 2: Scan the pages on a home scanner.

If you don't have a printer that scans, you can download [FREE apps](#) that will allow you to take a picture (or multiple pictures) and save it as a PDF (Portable Document Format). This is a commonly known way to share business documents while on the go and it's safe to use. This is great if you have 10 pages to one story. You can take pictures and save it as one story.

Now, that you have these digital images or PDF documents, you must take a few steps to make sure these precious mementos are save for your loved one forever.

Step 3: Backup your files somewhere.

Wherever you captured your files, whether it is your smartphone, digital recorder or computer, you should back them up somewhere. You have several free options such as ADrive, Apple Cloud, Box, Copy, Dropbox, Google Drive and Hive as just a few.

I personally prefer [Mega](#) due to its privacy policy and the 50GB of free space (versus 5GB iCloud, 2GB Dropbox, etc). I think with things that are extremely personal, like your family history and legacy. Some companies like Dropbox and Facebook have been known to openly share your files with no recourse.

IMPORTANT: If you store anything online or in the cloud (the cloud is just someone else's really big computer), then make sure you write the login information and password down on a piece of paper. Or you can type the usernames and passwords in an email and send it (but this is a less secure but more convenient option).

Alternative Option to Step 3: External Hard Drive

This is not a free option but it can be very reasonable. An external hard drive is something that you can buy and copy what is on your computer to another drive (place to keep your files safe). [This is a pretty BIG drive that is reasonable.](#)

You can buy an external drive for a little as \$30 and that may be plenty to keep everything safe. If you have a fireproof safe or a place that you keep your documents, you may want to put this drive with those documents.



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Storing the Memories continued 2

Yes, this may have gotten waaaaay more technical than you brain cares to handle but it's going to be OK.

I know this sounds like a lot, you're right, it is. But trust me, you can do this.

If you have having a hard time figuring out which option is the best fit for you, please email me at Bethanie@JoinMemento.com and send me a quick note of where you are stuck and we will do what we can to help!

DON'T FORGET:

If you setup ANY accounts online, don't forget to write down your username and password somewhere. Actually, a couple of places:

- Piece of paper – make copies of the paper and give it to a couple of people
- In Evernote (online note taking app/software)
- In LastPass (or other password managing service)
- Email is an easy option but my least favorite because it is notverysecure

Please make sure to share the account information with at least 2 people.

You want to make sure that if some thing happens to you, someone else knows how to find these precious archives.

Facebook Protip: You can download videos and photos from Facebook for your own account. [Here are instructions on how to download your own stuff](#). And to download someone else's Facebook stuff, [click here to learn how to do that](#) or [here are step-by-step instructions with pictures](#).

YouTube Protip: Many people think that YouTube is a safe option when keeping your memories safe. BUT, over 24 hours of videos are uploaded to YouTube per second. And YouTube may decide to delete unviewed content, for example, videos with less than 10 views. If that happens, you need to download your videos off YouTube asap. So, just stay in the know about your videos safety if you choose YouTube.



Difficulty (0-5)	★★★★★ - Kinda technical
Time Needed	60+ minutes
Resources Required	Time with a boatload of patience

A Backup to your Backup

This is ~~required~~ optional.

Now, I am a techie, so I have been burned many, many times by failed backup plans. So, this is my backup to my backup and these are way more important to me than my documents.

This is totally optional, but strongly recommended, for my sanity if not yours.

A backup to your backup means, don't put all your eggs in one basket. If you have everything on your computer, you might think it is all safe.

Well, it's not.

In that case, you don't even have a backup. You just have your computer.

You can auto-magically backup everything to [Google Photos](#) for free. If you are recording on your smartphone, then Google Photos is a great option.

You can install Google photos on your computer and your smartphone/tablet.

When you have a new photo on your computer or your phone, Google photos will back it up for you automatically. You have to turn this setting on, it is not on by default. [Here are instructions to turn this setting on.](#)

That is just ONE backup.

Because I am paranoid, I would have another backup. Like an external hard drive or another online/cloud account. I use [Mega](#) because I get 50GB for free and I am a thrifty person, so I love FREE.



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A Backup to your Backup - continued 1

Here are a couple of examples of backups to your backups:

Videos are now	Backup System 1	Backup System 2	Bethanie says...
Phone	Google Photos		No
Phone	Google Photos	Mega	Yes!
Phone	Google Photos	DropBox	Yes!
Computer	iCloud		No
Computer	Google Photos		No
Camcorder	SD Card	Computer	No
Papers	Phone	Google Photos	No

If you are saying, “Why did Bethanie give me a No and I have two different places that I have my files.

Well, most likely is because you count your phone, your computer or a SD (memory) card as a backup.

That is not a backup, it is the source or the original file. The ONLY original you have.

A backup is a *copy* of the original.

And a backup to my backup is a *copy of my backup*.

IMPORTANT:

Any service that you have your files located on, you must ask them what their policy is if something happens to you. Will they turn over your files to someone else if you die or become incapacitated? Just Google “What happens to my Dropbox (or whatever provider) files if I die?” and make sure you meet their requirements.

Apple, FaceBook and DropBox are super strict about this and in some cases will require a court order from a judge to “maybe” grant you access. And if you have to go to court against them, the law is on their side and all of the legal protection language exists in the terms and conditions you agreed to, but you probably didn’t read.



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A Backup to your Backup - continued 2

This is why I love Google photos, because I can say who gets access if I am inactive from my account for too long. It is a backup to my (first) backup. [Here is the link](#)

If you put anything online, please make sure that someone, or two people know about how to access these (and your other important files).

If you want my digital checklist that I use, please email me at Bethanie@JoinMemento.com and I will email it to you, it is not that hard to fill out and you can print as many as you want and give them to anyone. Plus, you can make sure that you have other family member's important account info written down.

The last thing you want to worry about when you have lost a loved one is the login information to the bank account, insurance account, etc. Pictures, videos and social media accounts are often the last thing we think of in such a time.

I have been there and done that and it is no fun.

Well, my friend. We have made it to the end.

You might be through a half of a cheesecake or your second bottle but you made it.

I am always around If you need a helping hand. Just shoot me a message or be super old school and actually pick up the phone (866-831-9888 goes to my personal cell phone). I answer the phone all the time for stranger things (than your questions), like Medicaid, pain relief for my back and many other unusual requests from time to time.

I would also like to ask you for ways I can make this easier for you or maybe even more enjoyable (or less painful). I don't know it can be improved unless you tell me, so your feedback is **super important** to me.

Bethanie



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