

What do you have to give?

What do you want others to receive from you?



The Lens of Legacy: You have more than money to give

What do you want others to receive from you?



Tangible Assets

Investments
Personal Property
Real Estate, etc.



Love, Support, Attachment

Values
Stories
Heritage
Information
Wisdom
Clarity of Feelings & Intentions

Time

Ideas
Expertise
Energy
Opportunities

A Universal Ethical Will for Loved Ones



Express Gratitude

What have they
given you?

How have they
enriched your life?



Share Wisdom

What are three
things your life
has taught you,
that you know
to be true?



Bless the Recipients

What are your
hopes for them?

What is the one
most important
thing you want
to say to them?

Side Letter with a Money Focus



Share the Story

What is the story behind the assets?

What are the reasons they exist?



Express Your Values

What have you learned about money?

What is your definition of success?



Bless the Recipients

What are your hopes for them?

What is the one most important thing you want to say to them?

Letter of Wishes to Trustees



Articulate Your Purpose

Why this vehicle?

What is your vision of a healthy impact upon the beneficiaries?



Express Your Values

What are appropriate, and inappropriate, distributions? Use specific examples.



Be Personal

Help them be able to stand in your shoes.

Express your gratitude to them.

Expression of Donor Intent



Answer the Question: Why?

What motivated you to establish this gift?



Express Your Values

What values are reflected in your decision?

Where did they come from?



Share Your Hopes

What is your vision for a healthy impact upon recipients?

Upon your family?

Dimensions of Legacy/Influence

PAST

Who has
made a
difference
in your life?

Carrier of Legacy

YOU

Creator of Legacy

PRESENT

FUTURE

In whose life
do you want
to make a
difference?