

## Are You a Legacy Leader?

How do you measure up? Rate yourself on a scale of 1 to 5 (5 being highest) on how well you have personally completed the following legacy tasks. Underline those on which you know you need to take further action.

### 1. Wealth Planning

*Rate Yourself*

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| a. My essential paperwork is in order (and user friendly).   |   |   |   |   |   |
| i. I have a completed financial plan.  | 5 | 4 | 3 | 2 | 1 |
| ii. I have a completed legacy plan including trusts, insurance and medical power of attorney.  | 5 | 4 | 3 | 2 | 1 |
| iii. I have explained the location of key paperwork to my executor, partner, or medical power of attorney.   | 5 | 4 | 3 | 2 | 1 |
| b. I recently met with my financial and estate planning team.  | 5 | 4 | 3 | 2 | 1 |
| c. I have a transition plan in place for my business or real estate interests.   | 5 | 4 | 3 | 2 | 1 |
| d. I have at least one key advisor I trust.  | 5 | 4 | 3 | 2 | 1 |
| e. My taxes have been minimized or I am paying my fair share.  | 5 | 4 | 3 | 2 | 1 |
| f. I am active in my planning—financially and philanthropically. I feel confident the structure of my plans meets my needs, serves my values, helps my family, and offers the best gifts for my community or my favorite causes. | 5 | 4 | 3 | 2 | 1 |

### 2. Self

*Rate Yourself*

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| a. I know what is most important to me, and I am diligent that my values are integrated into my philanthropic, financial, and legacy planning and daily consumer choices. | 5 | 4 | 3 | 2 | 1 |
| b. I am intentionally creating my mark on the world.  | 5 | 4 | 3 | 2 | 1 |
| c. I seek out more information on giving and legacies regularly.  | 5 | 4 | 3 | 2 | 1 |
| d. I use my time, energy, and talents intentionally.  | 5 | 4 | 3 | 2 | 1 |
| e. I recognize I am leading others by example.  | 5 | 4 | 3 | 2 | 1 |
| f. I am tending to my personal health and well-being.   | 5 | 4 | 3 | 2 | 1 |

### 3. Loved Ones

*Rate Yourself*

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| a. I have discussed—at length—my values around family and community service with my partner, kids, parents and/or siblings and close friends. | 5 | 4 | 3 | 2 | 1 |
| b. I have completed estate and lifetime planned gifts.  | 5 | 4 | 3 | 2 | 1 |
| c. I have designated key personal items or art to family members or friends.  | 5 | 4 | 3 | 2 | 1 |
| d. I am actively engaging the next generation for my legacy and for theirs.   | 5 | 4 | 3 | 2 | 1 |
| e. I feel confident that my executor and/or spouse understand my end of life wishes and have them detailed in writing or on tape.             | 5 | 4 | 3 | 2 | 1 |
| f. I have made peace with those I need to.  | 5 | 4 | 3 | 2 | 1 |

### 4. Community

*Rate Yourself*

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| a. I have an annual giving plan for my donations to nonprofits.   | 5 | 4 | 3 | 2 | 1 |
| b. I am actively engaged with other legacy leaders, mentors, or peers to consider how to leverage my influence to help advance what is important to me and my community.        | 5 | 4 | 3 | 2 | 1 |
| c. Through my work, I leverage resources and use my influence to create a positive impact for the community.  | 5 | 4 | 3 | 2 | 1 |
| d. I have identified the very best way to use my talents as a nonprofit volunteer and I volunteer my services on a regular basis.   | 5 | 4 | 3 | 2 | 1 |
| e. I am doing my fair share for my family and my community.   | 5 | 4 | 3 | 2 | 1 |
| f. I realize that my active sharing of my best practices may help others, so I offer to help others to set priorities about living and leaving their legacies as much as I can. | 5 | 4 | 3 | 2 | 1 |

**YOUR TOTAL SCORE**

**Out of 130 possible points, how did you score?**

**As you've probably demonstrated by the above exercise, in many ways you are a Legacy Leader. For most of us, though, there is still work to be done.**

**For all of us, the extent to which we take important actions and encourage others to do so helps our families, our community and our country.**