

Are You a Legacy Mentor?

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. | | | | | |
| 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 Mentor. 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.