

Exercise 11.2
Becoming a Legacy Mentor

15 minutes

Rate yourself on a scale of 1 to 5 (with 5 being highest) on how well you are completing the following legacy tasks. Underline those on which you know you need to take further action, then place a star next to the four or five that you will work on during the next few months.

1. Wealth Planning	Rate Yourself
A. My essential paperwork is in order (and user friendly).	5 4 3 2 1
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 in making sure 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

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3. Loved Ones Rate Yourself	Rate Yourself				
A. I have discussed—at length—my values of family and community service with my partner, kids, parents, siblings, and close friends.	5	4	3	2	1
B. I have arranged for 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 in planning for my legacy and for theirs.	5	4	3	2	1
E. I feel confident that my executor and spouse or partner understand my end-of-life wishes and have them detailed in writing or on audio.	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 active sharing of my best practices may help others, so I offer to help others as much as I can to set priorities about living and leaving their legacies.	5	4	3	2	1