



Legacy Planning Guide: Defining and Sharing Your Values

Purpose:

Your legacy is more than the material things you leave behind—it's the values, lessons, and memories that define your life. This guide will help you reflect on what truly matters, document your wishes, and share your legacy with the people you care about most.

Why Legacy Planning Matters

- **Preserve Your Values:** Pass on what's most important to you, beyond possessions.
 - **Create Meaningful Connections:** Strengthen bonds with loved ones by sharing your stories and lessons.
 - **Inspire Future Generations:** Leave a lasting impact on your family and community.
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Section 1: Reflecting on Your Legacy

Use these prompts to think about what you want your legacy to represent:

1. What life lessons have shaped who you are?
 2. What values are most important to you, and how do you live them?
 3. What are your proudest achievements, and why?
 4. How do you want to be remembered by your loved ones?
 5. What traditions or memories do you want future generations to carry forward?
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Section 2: Writing a Legacy Letter

A legacy letter is a heartfelt way to share your thoughts, wishes, and memories with your loved ones. Use the structure below to craft your letter:

Opening

- Address your letter to your family, children, grandchildren, or specific individuals.
- Begin with a message of love and gratitude.

Body

- Share personal stories that reflect your values and experiences.
- Offer advice or lessons you've learned over your life.
- Include any specific hopes or dreams you have for the recipient's future.

Closing

- End with a heartfelt message of encouragement, love, or pride.

Tip: Consider recording a video message to accompany your letter for a personal touch.

Section 3: Giving Back Through Charitable Contributions

Philanthropy is a powerful way to extend your legacy beyond your immediate family. Consider these ideas:

- Establish a scholarship fund in your name.
 - Donate to a cause that aligns with your values (e.g., education, healthcare, environmental preservation).
 - Volunteer your time and skills to a local organization and encourage others to do the same.
 - Include a charitable trust in your estate plan to ensure ongoing support for a cause you care about.
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Section 4: Creating a Values Statement

A values statement is a concise document that outlines the principles you want to pass on to future generations. Use this template to get started:

[Your Name]'s Values Statement

1. **Core Values:**
 - [e.g., Kindness, Integrity, Hard Work, Generosity]
2. **Life Lessons to Remember:**

- [e.g., “Treat others as you want to be treated.”]
 - 3. **Hopes for Future Generations:**
 - [e.g., “I hope you will continue to prioritize education and kindness in all that you do.”]
 - 4. **Family Traditions to Carry Forward:**
 - [e.g., “Our Sunday family dinners should always be a time for connection.”]
 - 5. **Closing Message:**
 - [e.g., “I am proud of you, and I trust you will honor these values in your own unique way.”]
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Final Thoughts

Your legacy is the lasting gift you give to the world. By documenting your values, sharing your lessons, and giving back to your community, you can create a legacy that reflects your life’s purpose and inspires those who come after you.

Start today, and give your loved ones the gift of your story, wisdom, and love.