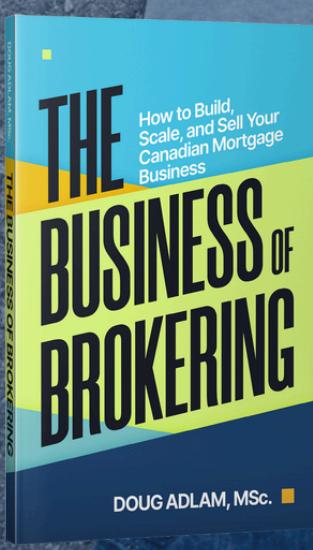


Chapter 20 – Worksheet

What's Your Legacy?



1. Defining Legacy

What do you want your legacy to be remembered for? Check or add your own:

- Financial strength
- Great leader & mentor
- Respected brand
- Community impact
- Family security
- Other: _____

In one sentence, my legacy vision is: _____

2. Myth of Indispensability

Where is my business still overly dependent on me?

- Client relationships: _____
- Daily decision-making: _____
- Operational oversight: _____
- Brand identity: _____

3. Scaling Beyond Yourself

How well can your business run without you? Rate 1-5:

Documented systems: _____

Leadership bench strength: _____

Client experience consistency: _____

Brand independence: _____



4. Client Independence

How dependent are clients on YOU vs. your TEAM?

100% on me Mostly me Balanced Mostly team Fully team

What changes will ensure clients trust your brand/team instead of just you?

5. Crisis-Proofing Legacy

If you had to step away suddenly (illness, family emergency, etc.), could the business continue?

Yes Somewhat No

6. Who Relies on Your Legacy?

Who would be affected if your business couldn't continue without you?

• Family: _____

• Team: _____

• Clients: _____

What responsibility do you feel toward each group?

7. Legacy Foundations

Rate your progress (1-5) on legacy strategies:

Brand beyond yourself: _____

Documented SOPs: _____

Leadership bench: _____

Key metrics tracked: _____

Which area needs the most immediate attention?

- Takeaway: Legacy isn't built at the exit—it's built in the systems, people, and values you establish today. The decision is yours: What kind of legacy are you building?