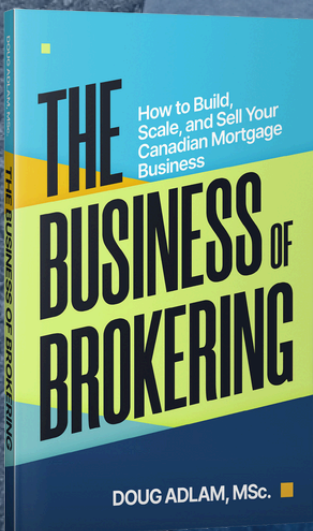


Chapter 20 – Worksheet

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

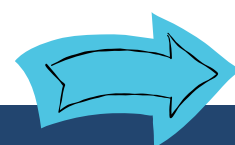
How well can your business run without you? Rate 1–5:

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?