



CENTRAL NEW YORK
COMMUNITY FOUNDATION

WORKBOOK: YOUR LEGACY PLAN



Name: _____



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YOUR LEGACY PLAN: Getting to the Heart of What Matters

At the Community Foundation, we believe that charitable legacy comprises so much more than just a monetary gift. Every donor has a unique giving story and your charitable legacy is an important part of our communal history. Creating a Legacy Plan can help you to connect with your motivations for giving, as well as to preserve your charitable legacy for years to come. By documenting your giving story now, you are essentially creating a roadmap for your future philanthropic efforts, which will serve as a way for successive generations to access your charitable intentions and inspirations even after you are gone. This process may even impact the way you think about your current giving.

You want to live your life with purpose, ensure your life's work and passions live on, make your donor intentions clear, and outline a path for stewardship of your philanthropic wishes after you are gone. Creating a Legacy Plan will help you uncover and document your values, stories, life lessons, family traditions and passions to help inform and inspire your philanthropic giving.

This exercise will help you...

- Live your life more intentionally
- Clarify what is important in your life, family and giving
- Ensure your philanthropic wishes are appropriately stewarded throughout the generations
- Provide a foundation for financial, life transition and philanthropic decisions
- Improve generational communication and relationships
- Inspire generational generosity and develop family resiliency
- Provide a cherished gift for family and future generations

GETTING TO THE HEART OF WHAT MATTERS

Helpful Tips:

- While you are working through the guided writing exercises in this workbook, consider any photographs you may have that will help bring your story to life. You will have the option to share copies of these photos with family members and/or the Community Foundation upon completion of the workbook.
- Anything you write in the following pages is yours to keep, so please feel free to write freely. When you have completed the exercises, you will have the opportunity to choose how much or how little is shared with family members and/or the Community Foundation.
- Your legacy journey need not stop here. If you are interested in going further, Community Foundation staff members are always available to discuss additional legacy planning services.

BIOGRAPHY WORKSHEET

Let's start with the basics. Please complete this worksheet so there is a complete inventory of the important people, events and details of your life.

Full Name _____

Address _____

Birth Date ____ / ____ / ____

Birthplace _____

If not a native, what brought you to Central New York? _____

Other Places Lived _____

Parents' names (including mother's maiden name) and occupations _____

Education (including any honors and degrees earned) _____

Military service (including rank, years of service, deployments and where stationed) _____

Professional licenses held _____

Employment history _____

Memberships in civic, political and fraternal organizations and clubs (including offices held) _____

BIOGRAPHY WORKSHEET (CONT.)

Church/religious affiliations _____

Hobbies and other activities _____

Marriage(s) _____

Family members (Names of parent, siblings, children, grandchildren) or
anyone else important in your life. Note relationship. _____

Other _____

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CURRENT GIVING EXERCISE

Consider the donations of money or time you have made in the last year (or years), and list them in the first column of this worksheet. Next, use the columns to the right to capture your personal motivations or reasons for why the gifts were made and the types of causes you’ve supported in the past. When the list is complete, indicate your top three charities (or causes most important to you) with a star. Extra space is available on the back of this page.

ORGANIZATION	REASON FOR SUPPORT	PROGRAM AREA

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CURRENT GIVING EXERCISE (CONT.)

ORGANIZATION	REASON FOR SUPPORT	PROGRAM AREA

SAMPLE LEGACY PLAN

The following Legacy Plan example was created by a Legacy Society member with assistance from Community Foundation staff. Details have been changed to protect her privacy. We share it with the hope it inspires and guides you as you share your own passions, generosity and goals through these exercises.

Jane Doe: Legacy Plan

Date: **Month Year**

Recorded by: **Staff member name**



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COMMUNITY FOUNDATION

The purpose of this memo is to provide the Central New York Community Foundation with instruction regarding the administration of the charitable fund to be created through a future gift from Jane Doe. Her overarching goal is for the fund to provide support for greatest community needs as they evolve and change over the years. Following is a snapshot of aspects of her background and values, as well as explicit wishes for the future grantmaking from the fund. It is provided to give the Community Foundation context when making decisions about the use of the funds that will result from her generous contribution.

Name of the Fund

The fund is to be named the ***Jane Doe Family Fund***.

Use of available funds

Jane's explicit wishes for the distribution of the spendable amount available annually from her **community fund** are as follows:

The purpose of the Fund shall be to support general charitable uses and purposes as determined by the Foundation's board of directors that will benefit the Central New York community. The donor understands and supports the mission of the Community Foundation and wishes to sustain its ability to respond in a nimble and flexible way to the most pressing opportunities and challenges in the community for generations to come.

Background

From Jane Doe: I have chosen to name this fund to include my parents, Janet Doe and John Doe, as a way to honor them as a part of our family legacy in this community. My parents were introduced to one another by my mother's brother. My uncle worked with my dad and brought him to my grandparents' house to meet mom. Mom resisted marrying dad for a while because she was the oldest in her family and didn't think she should leave her family. Eventually, in 1938, they married.

At the time, my mother was studying to be a school teacher. She attended Central High in Syracuse and had a four-year scholarship to Syracuse University for language study. While she studied, dad was farming and working to help both of their families to make ends meet. My mom canned everything when we were growing up.

Dad did a lot of volunteering through the church and was always helping other people. The candle factory where he worked made beeswax candles for churches and religion was always an important part of our lives.

My parents had three children. My brother Jim, who lives out west, was born in 1942. I was born in 1945. My brother Joe, who lives down south, was born in 1950. Both of my brothers have three children. My dad always said that he could tell that I was going to be a girl when my mom was pregnant, and I was the only girl born on my dad's side of the family.

In 1955, mom got a teaching job in the Baldwinsville school district teaching 8th grade. Mom and dad started working on building a house closer to the school, where I still live now. Dad sold the farm in 1956 when the house was completed. I have lived in this house ever since we moved here when I was 11 years old.

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SAMPLE LEGACY PLAN (CONT.)

When I was young, about 3 or 4 years old, I came down with the chicken pox and it damaged my ear canal and left me with permanent hearing loss. This disability was hard on me, and I was picked on in school because of it. Because I couldn't hear what the other kids were saying they would talk about me behind my back. As I am aging, my hearing is getting even worse, and one ear is much worse than the other.

I was initially diagnosed as being slow rather than having hearing loss. I was so good at lip reading the doctors didn't know that I had loss. Dad made them test me twice and realized that I did have a need for a hearing aid. At that time, the aid was this big box that hung around my neck on a wide cord. It was years before they had one that could go over your ears.

Even though I had a hard time in school, there were things about it that I liked. When I hear kids today I don't understand how they could not want to go to school. I think education is a privilege. I worked hard to keep up in school and graduated from high school in 1963.

I went to CCBI for one year to learn about retailing, but I never worked in that field. I ended up in computers at Lincoln Bank where I worked as a coder. I worked hard, sometimes having to lift 40 or 50 pound boxes of paper, which I didn't like too much. I moved around in the bank a little but I really enjoyed the computer work. I thought I would go back to school to learn more about computers, but my boss told me that the bank would train me. They did, and I worked there for almost 30 years.

Because I lived at home, I was able to help my dad when my mom got sick. She died of cancer in December 1972. She taught up until she got sick, and the cancer took her pretty quickly. She encouraged me to travel and continue to do things even when she was sick. It was hard on me and my dad to lose her at such a young age.

I left the bank in 1996 to take care of my dad. He was 94 years old at the time and really needed me to be home with him. The bank had really changed after it was sold anyway, so I didn't mind leaving at that time because I wasn't enjoying the work anymore. Dad lived for five more years, passing away in December 2001 at the age of 99. I often thought about how strange it was that my parents died so close to the same day so many years apart. I miss my dad so much. We always talked and we really were a good team. I still find myself wanting to talk to him every day even though it has been more than a decade since he passed away.

I hope that you can tell that my family was important to me, and my community is too. I am happy that I'll be able to give back to the community in honor of my parents when I'm gone.

I am pleased that our family's legacy will be used to support the greatest community needs in Central New York in perpetuity. There will always be new challenges in many different areas over the course of time, and I am glad that this fund will be able to respond to those needs in the most effective way possible.

I am proud to make this gift to give back to the community I have called home for my entire life. I feel confident that the Community Foundation can and will honor our wishes in perpetuity.

SAMPLES

For more Legacy Plan samples visit www.cnycf.org/LegacyPlan.

GUIDED WRITING EXERCISES

This section of the workbook is intended to provide exercises which will serve as a foundation for the creation of your Legacy Plan. You may follow the workbook in the order of the writing exercises or you may choose to only write about the topics that most resonate with you. Write as much or as little as you are comfortable, either within this workbook or by typing your thoughts on your computer. You may add pages as needed.

- 1. What were the first acts of generosity you participated in as a child (e.g., school, places of worship, organizations)? How did you feel and what did you gain from those experiences?**

- 2. Linking the Generations: Write about something you learned from your grandparents, parents, spouse, siblings, children or another loved one.**

GUIDED WRITING EXERCISES (CONT.)

3. Write about something you learned from experience.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

4. Write about something you are grateful for.

[illegible]

GUIDED WRITING EXERCISES (CONT.)

- 5. Life lessons: Write of your successes and/or examples of overcoming life challenges, and any life lessons you want to pass on.**

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

- 6. Often the easiest way to begin your Legacy Plan is to define your role models. Describe who you admire most for living a generous life and making a significant difference in the world.**

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on its right side, suggesting it's resting on a surface.

GUIDED WRITING EXERCISES (CONT.)

- 7. Think of someone outside of your immediate family. Explain what they gave to the world and why you admire them.**

[illegible]

- 8. Who were the most influential people in your life (your family, teachers, spiritual leaders, mentors, etc.) who taught you the most about being generous?**

[illegible]

GUIDED WRITING EXERCISES (CONT.)

- 9. Write about the inspirational sayings, teachings, or lessons that motivate you to live a meaningful life and explain why.**

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

- 10. Write about what makes you proud about your culture, heritage or family history and how that has inspired you to be a generous person.**

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

GUIDED WRITING EXERCISES (CONT.)

11. Describe any other motivations or inspirations that were instrumental in your generosity development (e.g., culture, faith, family, life experience, other).

[illegible]

12. Think about what you are truly passionate about. Passions are what capture your attention, inspire you, energize you to take action, and resonate with you in every way. Describe your greatest passion(s) and how they became a part of you.

[illegible]

GUIDED WRITING EXERCISES (CONT.)

13. Describe the values that you hold most dear – those which are integral to your deepest beliefs and help define purpose in your life. Why are they important to you?

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

14. Describe what you are most proud of when you think about your life, who you are, and what you have accomplished so far. Explain why.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

GUIDED WRITING EXERCISES (CONT.)

15. Describe something you had to learn the hard way.

[illegible]

16. What do you most want your community and/or loved ones to remember about you when you are gone?

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

GUIDED WRITING EXERCISES (CONT.)

17. Document any other thoughts to consider as you define your values, goals and priorities for your next stage of living a generous life.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

Extra Writing Space

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

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GUIDED WRITING EXERCISES (CONT.)

Extra Writing Space

This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced horizontal grey lines across its entire width, typical of notebook or school paper. There are no margins, text, or other markings present.

LEGACY FUND INSTRUCTIONS

If you share the work that you've done in the rest of this workbook with the Community Foundation, either now or after you are gone, the staff will have a good sense of your character, values and defining events. This means that your legacy will be about the story of who you were as much as what you leave behind. We can make sure that your personal story lives on, inspiring generosity in others and giving meaning to contributions that will be made in your name for generations to come.

Now it's time to use the insight you have gained by completing this workbook to create a practical roadmap for the future:

How would you like the Community Foundation to use the charitable fund that will be a part of your legacy in this community?

Name of the Fund: _____

Choose the option, or combination of options, that best matches your future wishes. These options are changeable over time.

____% of my fund will create a named Community Fund. This will support the greatest needs in our community as they evolve and change over the years. The Community Foundation understands my story, and can use that knowledge to respond in a nimble and flexible way to the important opportunities and challenges our community will encounter.

Alternative Options (refer to cnycf.org/fund for more information)

____% of my fund is designated to support a field-of-interest (e.g., healthcare, my town):

(instructions)

____% of my fund is designated to support a population (e.g., at-risk youth):

(instructions)

____% of my fund is designated to a specific nonprofit organization(s):

(instructions)

100 % Total

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CREATING A DRAFT LEGACY PLAN (CONT.)

Now that you have completed all the exercises, take some time to review your responses. Consider what information you would like to share with the Community Foundation in order to preserve your charitable wishes for generations to come. In other words, how would you like to be remembered by your community? When you are ready, begin drafting a letter that expresses your wishes for your charitable legacy. It may be helpful to refer to www.cnycf.org/legacyplan for examples.

Dear Central New York Community Foundation,
These are my wishes for the use of the charitable fund to be created through a gift from my estate. Following is a bit of my background and interests to give you context when making decisions about future distributions from this fund...

[illegible]

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CREATING A DRAFT LEGACY PLAN (CONT.)

[illegible]

WORKBOOK: YOUR LEGACY PLAN

CREATING A DRAFT LEGACY PLAN (CONT.)

[illegible]

THE LEGACY SOCIETY

Too often in the past, generous gifts entrusted to the Central New York Community Foundation have gone unrecognized because they came at the end of the donor's life. The Legacy Society provides a way to recognize and honor people like you who plan to benefit the Community Foundation in the future.

Statement of Intent (This statement is non-binding.)

Please include me in The Legacy Society (select one):

☐ Anonymously or ☐ Listed as: _____
(e.g., Mr. & Mrs. Smith; Jane & John Smith, etc.)

I have included the Community Foundation in my financial and/or estate planning using the following method(s):

☐ Bequest in my will Attorney: _____
☐ Life insurance beneficiary Insurance Agent: _____
☐ Qualified retirement plan beneficiary Financial Advisor: _____
☐ Charitable remainder trust Attorney: _____
☐ Other: _____ Professional Advisor: _____

It is my intention that this gift be governed by:

☐ my separate letter of instruction related to this gift that I have already completed with the Community Foundation.
☐ my separate letter of instruction related to this gift that I would like to schedule to complete. Please have Community Foundation staff contact me.
☐ my existing fund and the associated agreement.

Signature: _____ Date: _____

Name: _____

Address: _____

City/State/Zip: _____

Telephone: _____ Email: _____

Did you see the Community Foundation's advertisements, publications, website or news media stories prior to establishing your fund?

☐ No ☐ Yes: _____

PUBLICITY PERMISSION FORM

It is often helpful and inspirational for community members to hear the stories of others like them who decided to include charity in their planning. The Community Foundation may share these stories in the form of printed or online publications. However, you may prefer to keep some or all of your information private over a specific period of time or indefinitely. Please select one option from each of the three sections below to indicate the level of privacy you would like us to assign to your story and photography contributions.

I authorize the Central New York Community Foundation ("CNYCF") to share...

What?

- ☐ the entirety of my biographical information, Legacy Plan legacy stories and submitted photos
- ☐ only the following stories and information pieces: **(Check all that apply.)**
 - ☐ Biographical information
 - ☐ Legacy plan memo
 - ☐ Legacy workbook responses

If desired, note specific exclusions: _____

- ☐ Photos
- ☐ none of my biographical information, Legacy Plan legacy stories and submitted personal photos

With whom?

- ☐ the general public, as CNYCF sees fit
- ☐ a limited audience **(Check all that apply.)**
 - ☐ my family members
 - ☐ my personal friends
 - ☐ my professional advisors
- ☐ CNYCF only

Where?

- ☐ any publication the CNYCF deems appropriate
- ☐ specific places **(Check all that apply.)**
 - ☐ on the CNYCF website
 - ☐ within CNYCF press releases
 - ☐ within CNYCF publications
 - ☐ within CNYCF advertisements

Printed Name _____

Signature _____ Date _____

WHAT'S NEXT

Congratulations! You've finished recording your unique giving story and legacy fund intentions. Please contact your Community Foundation representative to provide this booklet, as well as any relevant photos and documentation, for the completion of your Legacy Plan.

GOING FURTHER

The Community Foundation offers a wide array of legacy planning services. If you are interested in exploring additional legacy offerings, here are some options to consider:

- More in-depth writing facilitation
- Writing workshops
- Preservation options (e.g. hardcover book with personal stories and pictures)

Please contact a Community Foundation staff member for additional information.

ONLINE RESOURCES

To view additional sample Legacy Plans or access the online Legacy Plan workbook visit,
www.cnycf.org/LegacyPlan.



CONTACT US

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This workbook was produced in conjunction with

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past, present and future

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