

Worksheet 1: Legacy Preferences

You've set in motion a living legacy of social impact through your history of giving, volunteering, advocacy, investing, and more. What's most important to keep in motion during the rest of your life and afterward?

This worksheet helps you document preferences for how your legacy stays in motion. It sets the stage for decisions in the other worksheets in this guide. It also can provide interim guidance to your successors and advisors should you become incapacitated or serve as a conversation starter as you collaborate with them on creating a Philanthropic Continuity Plan.

Do your best to complete as many items as possible and know that you can always revisit the ideas as you spend more time on your philanthropy. As always, there are no inherently right answers—just the answers that feel right for your legacy.

Legacy Levers

There are five primary levers you can pull to create your legacy:

1. **Shared values:** the characteristics and behaviors you feel are most important in your life.
2. **Intent:** your desires and vision as a founding donor, donor couple, or business.
3. **Place:** the emotional commitment and sense of responsibility to maintain giving in one or more locations, often places where you've generated wealth.
4. **Family:** the goals of bringing your family together and sustaining family connections, relationships, and opportunities to do good together.
5. **Action:** a focus on how you implement your philanthropic purpose—your strategies, social impact tools, and giving styles.

Which one or two of those levers give the most power to your philanthropy? Why do they resonate most with you?

What two or three gifts of financial resources have you made that are most emblematic of the levers you chose?

What two or three examples of your volunteering or advocacy have been most emblematic of the levers you chose?

Should those same levers power your philanthropy after you're no longer involved? If not, which do you hope your successors prioritize? What's the importance of the different choice?

Legacy Dials

There are a few classic tension points in how a social impact vehicle or philanthropic strategy evolves, especially as founding donors step away or pass away.⁵ Along each of the dials below, indicate your preference of how you see your philanthropy many years in the future.



⁵ Some dials are dimensions of family culture found in Generations of Giving, Gersick, Stone, Desjardins, and Muson © 2006