

The Living Legacy Scorecard

Legacy planning is not the same as estate planning or philanthropy. Estate planning focuses on transferring of assets. Philanthropy focuses on giving. Legacy planning focuses on how to transfer your total wealth to family and charity. Total wealth includes not just assets, but also values and experience. A *Living Legacy* makes an impact for good today as well as in the future.

Rate each question according to how well you have fulfilled the question.

1 means you have done little or nothing, a 5 means you are there.

		No		Neutral		Yes	
		1	2	3	4	5	
1	I have shared my life story with my children and grandchildren						
2	I know what my values and purpose are in life						
3	I have clearly communicated my values and vision to the next generation						
4	My family and I regularly have open discussions about what is important to each of us						
5	I have a "bucket list" of goals that I am working on						
6	I have a clear vision of what I want my future to be						
7	I know my values and what or who inspires my giving						
8	My giving, investing and volunteering align with my values						
9	I have identified the very best ways to use my time, treasure and talents to make a difference						
10	I am actively engaged in leveraging my influence to create a positive impact in the community						
11	I am intentionally creating my mark on the world						
12	I am actively engaging the next generation in planning for my legacy and theirs						
13	I have a giving plan for this year						
14	My financial advisor has discussed legacy planning with me						
15	I have a coordinated financial plan, giving plan and estate plan that reflects my values and legacy goals						
Your Score (total points):							

Understanding your score:

Less than 30: Your life is in disarray. You need help!

30 to 44: Things look a bit foggy. You need clarity.

45 to 60: You have taken some steps, but you are not reaching your potential.

Over 60: Good job! You may only need a slight tuneup.