

the
Living Legacy Plan™

living and leaving an extraordinary legacy



You Have Worked a Lifetime to get to Where You Are

Why not make sure all your hard work continues to reflect your values, interests and passions long after you are gone?

Learn how the **Living Legacy Plan™** can help you achieve that goal. Through a series of personal appointments and interviews, we will help you define and develop a legacy plan that will:

- ▶▶ **Tell and preserve your life story.**
- ▶▶ **Help you connect and contribute your time, talents and treasure to the causes, concerns and organizations that mean the most to you.**
- ▶▶ **Potentially maximize your financial position to pay lower taxes and increase what you have to share.**

Wealth. It's about more than money! The **Living Legacy Plan™** assumes a holistic view of wealth. Our focus is on helping you develop a legacy plan that includes your personal, your social, as well as your financial resources.

- ▶▶ **Your Personal Wealth.** Your personal wealth is made up of the experiences, values, skills and competencies that you have developed over a lifetime. We will help you preserve those experiences and values in story form. We will also help you explore ways you can share your skills and competencies with a world in need right now.
- ▶▶ **Your Social Wealth.** Social wealth is primarily about the influence you have acquired over the years. How do you use that influence within your family, your community and among your peers and friends to make the world a better place? Most people have more to give in this area than they realize. We will help you think through ways to leverage that influence to make the kind of difference you want in the world around you.
- ▶▶ **Your Tangible Wealth.** Your tangible wealth includes such things as stocks, real estate and retirement plans. How can you protect your estate so as to leave a significant contribution to the organizations and causes you care about and, at the same time, leave a meaningful legacy and tax-free inheritance to your heirs? We can help you take advantage of favorable tax laws and financial products in order to super-charge your estate for charity and family.



In addition to helping you clarify your true wealth, the Living Legacy Plan™ helps you align all three in a way to maximize your impact. We will help you find that “sweet spot” where time, talents and treasure can be invested in the people, needs, causes and organizations that really matter to you.

PERSONAL WEALTH:



Legacy Talks – preserving your history

The essence of any legacy is a life well lived. Your real wealth is not money and property. Your wealth is who you are as a person, the path you have traveled, your values and vision as well as the key people, experiences and choices that have shaped your life. That's your personal wealth and its impact is seen in the lives of family, friends and others you have influenced because of who you are as a person.

As a matter of fact, when it comes to your legacy, a recent study found that the non-financial items you leave behind – wisdom, life lessons, stories, values, morals, and faith – are ten times more important to family and loved ones than financial inheritance. Yet more often than not, these stories and lessons never get shared.

As part of the **Living Legacy Plan**,™ we schedule and record a series of interviews

with you about your life called *Legacy Talks*. We turn a simple chat into a touching and lasting treasure. Using a handful of interesting questions and a digital recorder, we help you share and save the lessons and experiences of your life.

Whether you're a young parent, a middle-aged couple, or a senior citizen, there's a *Legacy Talk* that's right for you. Depending on the subject, you can recall adventures from your childhood, give advice on using money wisely, or pass along secrets for a happy and successful life. The finished product is a personalized CD in your voice telling the real story behind the accomplishments of your life. It is a way for you to bless loved ones, for generations to come, with a collection of stories that tell of a lifetime of living, learning, loving and serving. Your Legacy Talks!

SOCIAL WEALTH:

Plan to Make a Difference – the rest of the story

Tom Brokaw once said, “It’s easy to make a buck. It’s a lot tougher to make a difference.” We want to help you with that challenge. The second feature of the **Living Legacy Plan™** is what we call ***Plan to Make a Difference***. It begins where Legacy Talks leaves off because your story isn’t over...your legacy isn’t finished; there are still chapters to be written!

Even in the pursuit of our own happiness and success, most of us are aware of an inner desire to make a difference in the lives of others and in the world around us. But acting on that desire is oftentimes harder than it appears. We become paralyzed by a lot of good questions: Where do I start? What really matters to me? What can I do? Who can help me sort this out?

Plan to Make a Difference will help you answer these questions and pursue the legacy you want to leave...the difference you want to make.

We all have more to give than we know and it’s not just measured in dollars. Over the course of our lives, we develop skills, competencies, passions and personal networks that we can use to make a difference in a variety of places. ***Plan to Make a Difference*** is designed to help you identify and clarify this type of wealth and then develop an action plan to explore various opportunities and organizations

where you could dedicate time, talent and treasure.

Through a series of one-on-one meetings, we take you through a simple process of identification, clarification, exploration and dedication. You decide how fast and how far you want to go with your ***Plan to Make a Difference*** and we help coach and connect you to possibilities. We have helped individuals find and plug into reading/mentoring programs, use their skills to build housing for low-income families, start their own nonprofits, build a preschool in Kenya, adopt a village in India...and the list goes on. Our goal is to help you explore your possibilities and potential and then connect you to the people, causes and organizations that matter the most to you.



A typical financial and estate plan revolves around the efficient accumulation and distribution of assets with little concern or attention paid to the client's values, concerns, dreams or hopes. Great care is taken in building investment portfolios and to carefully draft trusts. Yet, when it is all said and done, do these plans really represent your core values or the road most traveled?

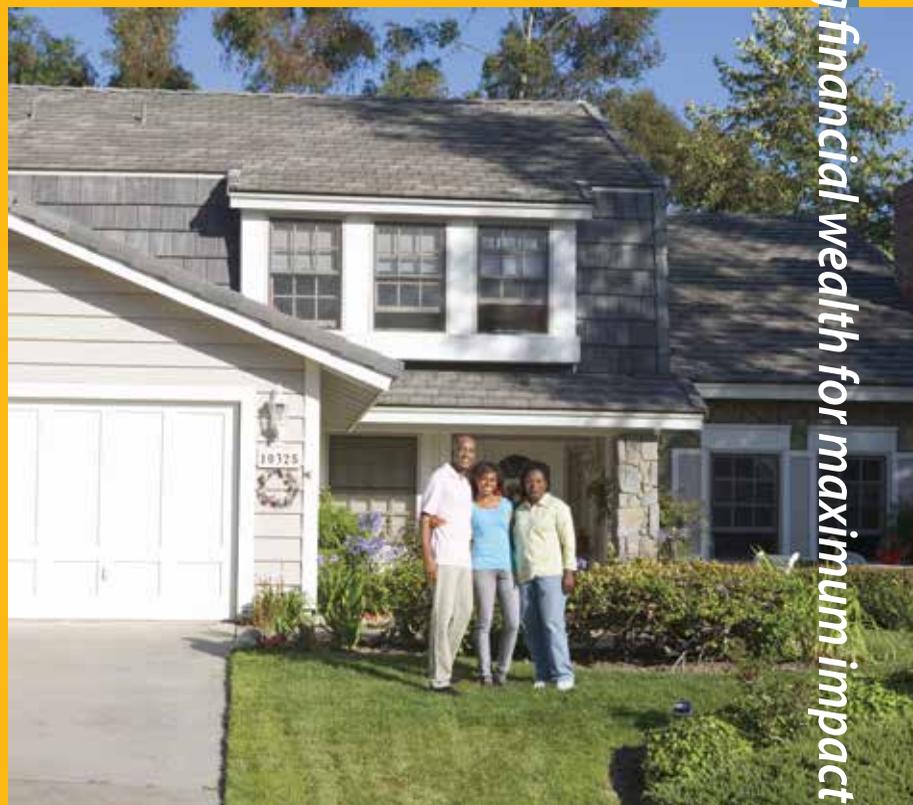
The problem is that many estate plans use a "cookie-cutter" approach that tends to fail at the very tasks they were designed to solve. And, whether it fails to accomplish its intended purposes or not, it almost certainly fails to live up to its potential. Market gyrations can create uncertainty in asset values and retirement income. Improper registrations or beneficiary designations can negate otherwise good planning. A trust may eliminate estate taxes, but it exacerbates income taxes on retirement plans and, more often than not, charitable intent is actually derailed.

The **Legacy Financial Plan** takes all of this into consideration and builds off the work we have already done in the Personal and Social Wealth sections of the **Living Legacy Plan™**. It is structured to reflect your unique financial situation, along with your inheritance wishes and charitable giving goals. Most plans do not need to be overhauled but rather tweaked and supplemented in ways that may make possible the fulfillment of your dreams. We do not replace your current advisors but work with them to optimize your plan.

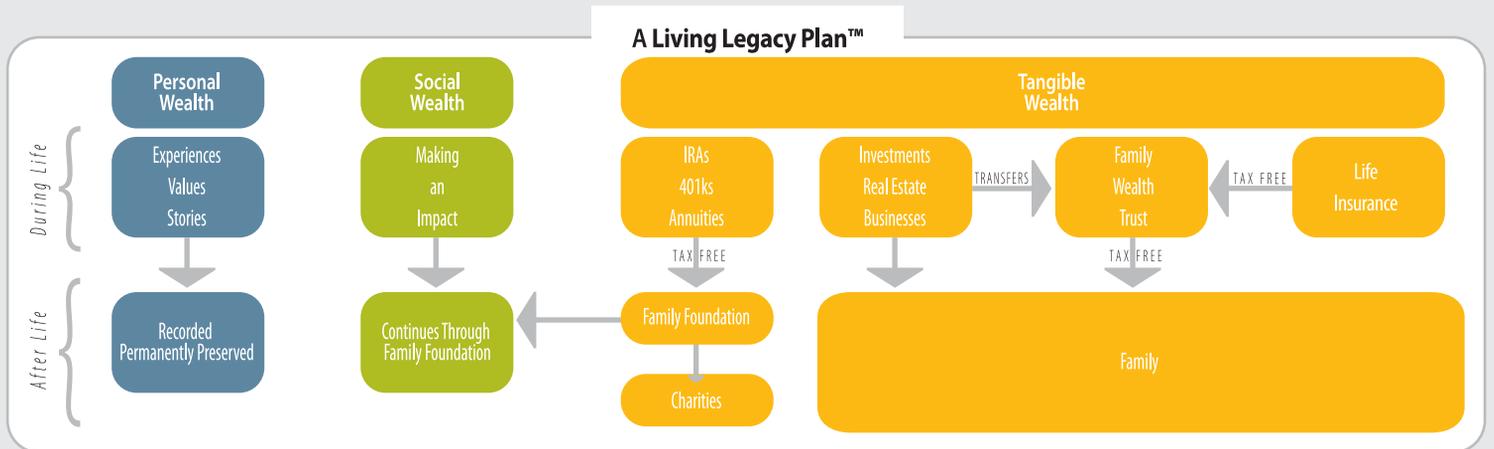
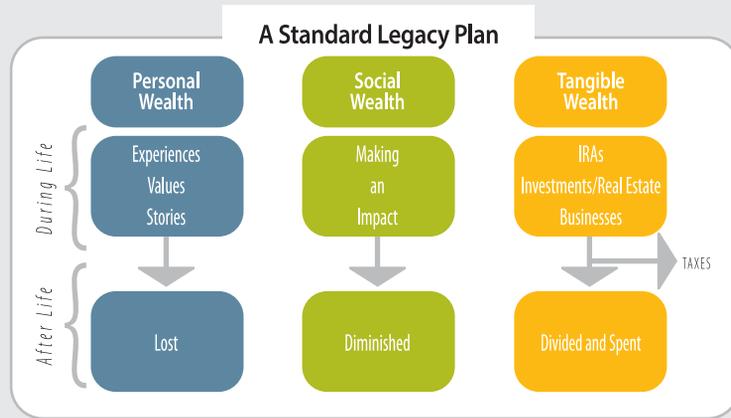
The exact strategies used in the **Legacy Financial Plan** vary depending upon your specific situation. Many of the strategies used to be reserved only for the very wealthy, but technological advances, along with product and service innovations, now bring their availability to a broad population.

For example, family foundations and donor advised funds are a flexible method of philanthropy that can make a significant difference not only with the organizations and causes you care about, but also with your own children, grandchildren and generations to come. Charitable trusts are used to sell and grow assets tax free and generate retirement income. Wealth replacement trusts leverage estate assets to enhance the value of your estate. The Charitable IRA, combined with the Wealth Replacement Trust, may allow IRA assets to be distributed to charity tax free without reducing what your heirs receive.

We will help you explore a wide range of options and develop a **Legacy Financial Plan** aimed at optimizing financial wealth for maximum impact.



A LIVING LEGACY PLAN - All Living Legacy Plans™ are Unique...this is one possible scenario!



Family Foundation may be either a private family foundation or donor advised fund through a community or national foundation.

Family Wealth Trust is a generic term which may include a trust or other investment and insurance accounts designed to provide tax-free income and prefund the next generation plan.

How to Get Started

Try the Living Legacy Plan™ risk-free at no cost and see if it's for you and your family.

The initial consultation includes a free **Legacy Talks** interview called “Turning Points; Significant Moments and How They Shaped My Life” recorded on the spot and given to you to keep and share with your family. We also do a personalized assessment to better understand your interests, needs and desires around the subject of living and leaving a legacy with your personal, social and tangible wealth.

You really can live and leave an extraordinary legacy! We would love the chance to help you realize that dream through the **Living Legacy Plan™**.

As a result of implementing the **Living Legacy Plan,™** you are assured that:

- ▶▶ **Your personal values are communicated and passed on to future generations.**
- ▶▶ **Family charitable involvement is enhanced.**
- ▶▶ **Family cohesiveness is encouraged.**
- ▶▶ **You have made a significant contribution to the people, organizations and causes you care about.**
- ▶▶ **Your giving will continue long after you are gone.**

To schedule a consultation with a free **Legacy Talk**, contact us:



Tom Bassford

has been helping people discover their passion and ways to make a difference for over 40 years. He is currently the founder and President of *Significant Matters*, a nonprofit organization focused on connecting those who want to help with those who want help. He has earned a

reputation as a tireless champion for collaboration to meet needs in more sustainable ways. He founded a TED Talk type of event called SATtalks (www.SATtalks.org) where you can see and hear the stories of people and organizations committed to creating sustainable transformation through the work they do.

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Wayne is a Certified Financial Planning Practitioner (CFP) and a Chartered Advisor in Philanthropy (CAP) with over 35 years' experience working with hundreds of individuals and families to help them achieve their financial goals and dreams. He founded *Generous Vision* in 2016 as the culmination of

a career in financial planning and the beginning of a new initiative to focus on helping people and organizations achieve their philanthropic potential.

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The **Living Legacy Plan™** is a joint initiative of **Significant Matters** and **Generous Vision** to help people live and leave a legacy that makes a lasting difference.