

"I came this way for you to follow."

Your personal legacy statement workbook

The Bridge Builder

By Will Allen Dromgoole

An old man going a lone highway
Came at the evening, cold and gray,
To a chasm, vast and wide and steep,
With waters rolling cold and deep.
The old man crossed in the twilight dim,
That sullen stream had no fears for him;
But he turned when safe on the other side,
And built a bridge to span the tide.

"Old man," said a fellow pilgrim near,
"You are wasting strength with building here.
Your journey will end with the ending day,
You never again will pass this way.
You've crossed the chasm, deep and wide,
Why build you this bridge at eventide?"

The builder lifted his old gray head.
"Good friend, in the path I have come," he said
there followeth after me today
A youth whose feet must pass this way.
This chasm that has been naught to me
To the fair-haired youth may a pitfall be.
He, too, must cross in the twilight dim—
Good friend, I am building the bridge for him."

Name _____

Date _____

Money and property are only part of what you have to share with others. Your real wealth is the living declaration of who you are as a unique human being – of the path you have traveled in your life, and the bridge of values, vision, wisdom, and experience that you have to offer your loved ones.

A *Personal Legacy Statement* is not just a statement of how you wish to be remembered after you pass on. It is a vibrant, potentially transformative instrument that can build bridges in your life *now*, enriching your family, friends, and community.

“Time flies,” as the saying goes...and all too often, we let years, decades, even an entire lifetime go by without offering the best of us, even to those we love most. If you’ve never taken the time to document who you are for those you love – your dreams and accomplishments, the things that matter to you most, the lessons of lasting value that you’ve learned – take the time now. Complete this brief workbook; we’ll use your responses to develop the first draft of your *Personal Legacy Statement*. You may find that the most important people in your life, upon reading this Statement, rediscover the bridge that your life has built between you and them, and find new joy in following.

Heritage

What were the names of your parents and grandparents? Where were they born?

What are the some of the most important values that were passed on to you by your parents? Your grandparents?

Some of the things about my heritage that define me are:

How much of a role does your heritage play in your life now?

Family

Where did you grow up? How did this place shape the kind of person you became?

What is an important lesson you learned in your early life? How does it continue to influence your beliefs and values? What taught you this lesson?

Who were two or three influential people in your childhood? How were they influential?

Did you have an experience growing up that was life changing? Describe the experience and why it was so significant for you.

What are the three or four most important relationships in your life?

Looking back: Which of your accomplishments do you find most gratifying?

Looking ahead:

Name something you would like to accomplish or see happen during the rest of your life.

What do you feel are some of the most important qualities a person needs to live a rewarding life?

What do you feel is the real measure of success?

What was your greatest challenge? What did this experience teach you?

Describe your proudest moment.

What are a few of the most important ideas or lessons you would like to pass on to your children, grandchildren, or other loved ones?

What was the single most important experience of your life? Why was this so important to you?

If you could pick three things that your family would remember about you, what would they be?

Rate the following values in order of their importance to you, from “Very Important” o
“Unimportant.” *Feel free to leave blank any items you don’t wish to rank.*

- Cultural values such as art, music, travel
- Economic values such as financial responsibility, frugality, savings.
- Educational values such as study, self-improvement, academic achievements, lifelong learning.
- Emotional values such as compassion, kindness, generosity.
- Ethical values such as honesty, fairness, justice.
- Material values such as possessions, social standing, rank and title.
- Personal values such as modesty, loyalty, Independence.
- Philanthropic values such as volunteer work, donations, (time and money).
- Physical values such as health, relaxation exercise, appearance.
- Public values such as citizenship, community involvement, public service.
- Recreational values such as sports, leisure time, hobbies, vacations.
- Relationship values such as family, friends, colleagues.
- Spiritual values such as faith, belief in God, inner peace.
- Work values such as effort, competence, Professional recognition and success.

Community

What are some organizations, causes or issues, or activities that you have found especially meaningful?

How much has your community experience shaped your life and sense of who you are?

Pick three things that you would like members of your community to remember about you.

What are some of the best ways a person can make a difference in his or her community?

Financial Resources

What do you appreciate most about money?

What do you worry most about money?

What do you want the material gifts you pass on to your heirs to accomplish for them?

What concerns do you have about the distribution of your material wealth as part of your legacy?

What do you believe would be a foolish thing to do in arranging to leave material gifts behind for your loved ones? A wise thing?

Now that you've completed the Workbook, our office will use it to prepare the first draft of your *Personal Legacy Statement*. You'll find that this is a "living document," one that you may want to revise or amend. Certainly, your *Statement* will secure a place in the minds and hearts of your family and close friends later on. But you may also choose to share it with them now, as it can have a profound effect on how they see you. The *Personal Legacy Statement* will help you to:

- Gain a clearer understanding of your own vision and values, how you want others to regard you, and what's most important and meaningful to you about your life.
- Build a bridge, reconnect, or deepen your bond with family members and friends.
- Close some of the distance created by the geographic separation of family and friends
- Enjoy the peace of mind that comes with knowing that your loved ones will know and remember you as the person you are, including the things that matter to you most

What's next? We're here to help you formulate, clarify, and document all aspects of your personal legacy, and to provide you with a new level of financial services and products designed to serve you as a whole person, not just a portfolio.