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Your life is your legacy

Presenter: Gloria Vidovich, Planned Giving & Donor Relations Officer
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What is a legacy?

- A gift of money or possessions; transfer of assets; inheritance



4 Pillars of Legacy

2005 Allianz Life Insurance Study:

- Values and life lessons
- Personal possessions of emotional value
- Wishes and directions to be fulfilled
- Financial assets/real estate

The impact of legacy

2012 Allianz Life Insurance Study:

- Family stories – 86% Boomers / 74% Elders
- Personal possessions – 64% Boomers / 58% Elders
- Expectation of inheritance for financial well-being 9% Boomers / 14% Elders

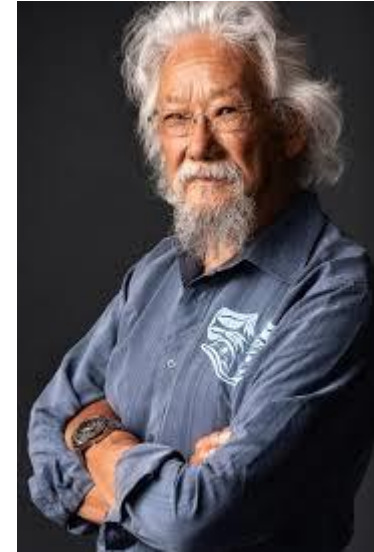
Legacy is also...

- The actions you take in life, and how people will remember you
- Influence that endures





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What is a legacy letter?



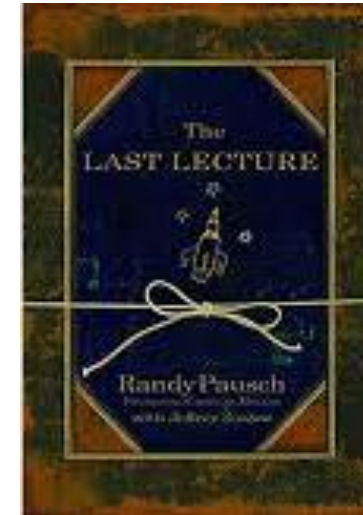
An expression of your:

- Core values and belief system
- Life lessons
- Hopes for the future



Why write a legacy letter?

- Self-reflection
- Share your core beliefs and values
- Reconciliation



"It's not about how to achieve your dreams, it's about how to lead your life. If you lead your life the right way, the karma will take care of itself, the dreams will come to you."



- Storytelling



*“The Bruce Trail changed my life. It lengthened my stride and gave joy to my life.”
– Dr. Philip Gosling, Bruce Trail Founder*

- Future aspirations
- Supplement to a legal will & philanthropy
(Legacy letter is not a legal document)



Photo by: Matteo Bidulph

Getting started

- Content
- Supporting elements
- Creative layout





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Values
Calmness Carefulness
Competence Achievement Diversity
Responsibility Adventure Self-reliance
Loyalty Discipline Resourcefulness
Altruism
Acceptance Sincerity
Artistry Knowledge
Discretion Self-respect Love Selflessness
Self-control Sensitivity Articulacy Kindness
Accountability Accuracy
Respect Flexibility
Creativity



- What have been some of your major life accomplishments?
- What have you dreamed of accomplishing but haven't?
- Highlights of wisdom you've gained?





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- Who have been the key influencers in your life?



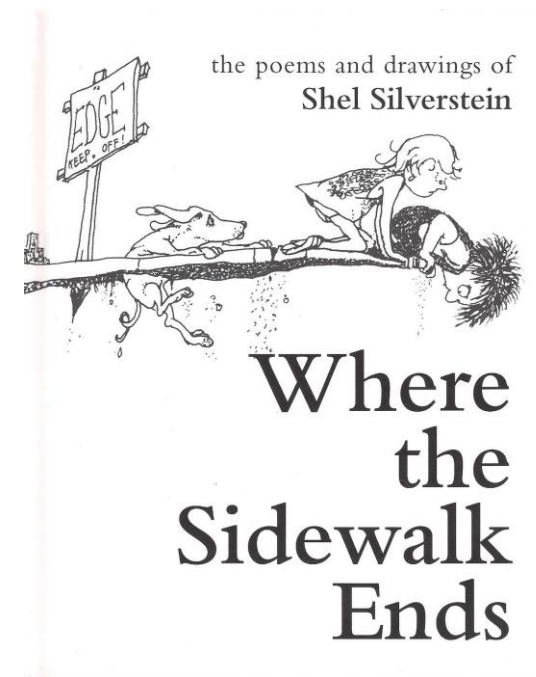


- If you had an opportunity to go back in time, what ancestors would you like to meet?



Supporting elements

- Favourite quotes
- Song lyrics
- Favourite recipes
- Collections



*“And all the colors I am inside
have not been invented yet.”*



Creative Layout

- I am writing this letter because:
- You are special in my life because:
- The biggest highlights in my life have been:
- Truths I have learned about:
- The best gift I've received / The best gift I've given:
- My hope for you / the world is:
- Closing message:



Creative Layout

- Themes
- A look through the decades
- Lists
- “I love you” letter

Creative Layout

- Scrapbook / Photo album
- PowerPoint presentation
- Video



Timing

- Milestone events
- Key anniversaries
- Alongside the development of your estate plans

It's yours to choose!



www.willpower.ca

Resources:

- Legacy Letter samples: <https://www.legacyletter.org/>
- *So Grows the Tree: Creating an Ethical Will*, Jo Kline Cebuhar
- *The Well-Lived Life*, Lyndsay Green
- Estate Planning: www.willpower.ca



MISSION

**Preserving a ribbon of wilderness,
for everyone, forever.**

VISION

The Bruce Trail secured within a permanently protected natural corridor along the Niagara Escarpment.

brucetrail.org

 [TheBruceTrailConservancy](https://www.facebook.com/TheBruceTrailConservancy)

  [@brucetrail_btc](https://www.instagram.com/brucetrail_btc)

Rated top environmental
charity in Canada for 2020
by Maclean's