

DESIGNING A LEGACY

Preserve What Matters Most For Future Generations

	YES	NO
1 Have you reflected on the personal values and life lessons you want to pass on to future generations?	<input type="checkbox"/>	<input type="checkbox"/>
2 Have you documented important family stories, traditions, or experiences that shaped your identity?	<input type="checkbox"/>	<input type="checkbox"/>
3 Do you regularly share insights, beliefs, or lessons learned with younger family members?	<input type="checkbox"/>	<input type="checkbox"/>
4 Have you considered writing or recording a legacy letter, video message, or personal memoir?	<input type="checkbox"/>	<input type="checkbox"/>
5 Do you feel confident that your loved ones understand your guiding principles and core beliefs?	<input type="checkbox"/>	<input type="checkbox"/>
6 Have you organized photos, keepsakes, or family documents in a way that tells your story?	<input type="checkbox"/>	<input type="checkbox"/>
7 Have you had conversations with family about your hopes for how you'll be remembered?	<input type="checkbox"/>	<input type="checkbox"/>
8 Do you intentionally model values such as kindness, resilience, or gratitude in your everyday life?	<input type="checkbox"/>	<input type="checkbox"/>
9 Have you identified ways your legacy can continue through mentorship, service, or family traditions?	<input type="checkbox"/>	<input type="checkbox"/>
10 Are you actively preserving not just your assets, but also your voice, wisdom, and worldview?	<input type="checkbox"/>	<input type="checkbox"/>

QUESTIONS? CONTACT YOUR FINANCIAL ADVISOR



THE CENTER FOR
RETIREMENT READINESS

What Your Answers Might Mean:



7–10 Yes Answers: You Are Thoughtfully Preserving Your Life's Legacy: Your stories, values, and wisdom will enrich generations to come and offer meaningful guidance long after you're gone.



4–6 Yes Answers: You're On The Right Path But Still Have Work To Do: You've begun the important process of legacy-building—completing and sharing your insights will strengthen your impact.



0–3 Yes Answers: You May Be At Risk And Need To Take Immediate Action: Without intentional effort, your wisdom may be lost—now is the time to capture and communicate your legacy while you can.