

Legacy Planning Worksheet



Section 1: Self Analysis

Any good strategic planning process begins with an analysis of the entity, company, group, or in this case individual (YOU) who intends to DO something. Wisdom of the ages agrees...you must do something you love. Building a legacy with your grandchildren in mind is no different.

So *who are you*?! Think about your life's most fun, stimulating times, topics, or activities. Write them down. Don't edit your ideas in your head...write them down as they come.....

Section 2: Grandchildren Analysis

Take some time to think deeply about your grandchild's core interests. Fill one out for each grandchild. Remember, it may take more thought to identify core interests in your grandchildren, than of your own. Challenge *your thinking* to be sure that the interests you identify are really ***THEIRS***.

My Grandchild's passionate interests include:

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Section 3: Innovate: Combining your interests with theirs...

Here's a tool to force your *thinking mind* to combine seemingly incompatible ideas. Your conscious mind will resist! Breaking through this resistance is the key & part of the process. If you're very lucky, you *may* be struck quickly with your own eureka...but be patient if it takes some time. Go through the written exercise to combine each of the top 3 interests. Brainstorm a new concept for each one. Circle or star any idea that lights even the slightest spark. Then, sleep on it, and promise to come back to the sparks you find. Expand on them further. *EUREKAs!* come from your gut, your intuition. Be prepared as this can happen at any time. This *exercise* is an effort to put your subconscious mind to work for you. This is how all great ideas are born.

Your top 3 interests

Grandchild's top 3 interests

A _____

X _____

B _____

Y _____

C _____

Z _____

New Ideas : Combination Brainstorms

A-X _____

A-Y _____

A-Z _____

B-X _____

B-Y _____

B-Z _____

C-X _____

C-Y _____

C-Z _____

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Section 4: VISION statement of Legacy

From your combination brainstorm, you've identified one or more creative concepts that "speaks" to you. Each of these ideas likely spawned for you a whole host of other related sub-concepts or ideas..to the point where you needed more paper! This is the sign that your intuitive mind has been hard at work. Now, take a good look for the major theme(s) that are there and try to filter them down to one sentence. We are now tasking your conscious mind to achieve a statement of clarity. Having a clear, concise statement will be valuable beacon to keep you on track and also help you to communicate your vision to others.

My Legacy Theme:

Section 5: Share your Legacy

You've come a long way! Congratulations! But, don't stop now. This next step is just as critical to enable your legacy success. Share your goals. Identify who your strongest advocates will be. Identify any and all initial obstacles you will have to overcome. Insight here will be important as you define an action plan. For now take time to express your goals and gain feedback. Check off each box below.

I have expressed my legacy theme to:

Feedback received:

My spouse

My grandchild's parents

My close friend(s)

*Other influential adults**

* Many grandchildren will have other influential role-models that could make great advocates to your legacy theme. A teacher, coach, neighbor, parent of a friend, church contact, etc.

Remember too on this section that you are bound to hear some negativity in the feedback. Embrace it for the insight for which it is. You alone are responsible for your legacy creation. Identifying initial obstacles will help you define the best route for success; and guide you on who you might need to win over for additional support.

Take a hint from the best sales teachings in the world...frame your legacy theme in a manner which highlights how it may augment / support the interests & themes that the influential role-model is likely supporting. Ie...if *they* had a legacy effort, what would it be? (**Hint: Ask them...**and practice listening intently. Is your theme synergistic? Show them how it could be.)

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Section 6: Planning...Establish goals & action plans

Here are some ideas to get you started. And, I encourage you to implement the use of a separate planning tool, either electronic or paperbound. You'll find suggested items in the **Planning** section of the www.lovemygrandchild.com/create_your_legacy.html page.

The key is to find a mix of short and long-term goals. Pick a time reference for each that fits your lifestyle and purpose best. Or, choose the suggested timeframes here below.

Goal / Project Formation

Convert your legacy theme into tangible projects. Projects have a starting point and an ending point. Short duration projects are of course less complex...and you should consider a mix of several short term and fewer long-term projects. A **series of projects** that reinforce a **theme** or address it from different perspectives translates into a **legacy building effort**. Avoid the mistake of taking on too many. Here, quality trumps quantity.

Monthly Projects

Annual Projects

Five-Year Project

Action Planning

Most of us have an established routine that follows the tempo of the 7-day week. As a result, action plans are most tangible in following this same rhythm. Pick a day & time each week (ex: every Sunday before bed) to consider action items for the coming week. For each project (monthly, annually, and long-term)...identify any action items you can tackle this week.

Make sure you have a calendar tool. And, here's the super-powerful step that separates >95% of society from achieving their goals...**schedule your key action items**. That time is blocked. You'll never have to suffer along with the "I just don't have time" crowd. You just *made* time!

Visit www.lovemygrandchild.com/createyourlegacy.html to find some great action planning tools & insight.

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Section 7: Renew

If you have travelled through the process of this exercise, your grandchildren are truly blessed. You have taken initiative & effort that far exceeds the efforts by the wide majority of humankind. And make no mistake...the actions you have just completed represent the most powerful steps taken by the world's most successful people. Your purpose clarified. Your will steeled. Your legacy and positive mark on the world are assured. Take action. And never quit. When you feel the need to recharge your efforts or overcome a particular hurdle, take time to *RENEW*...

- Upon reaching each milestone, take time to reward yourself.
- Remind yourself of your purpose.
- Feed your will to win.
- Train your brain.
- Learn from your mistakes.
- Never, ever quit.
- Try new methods.
- Expand on earlier wins with even more ambitious plans.
- Life is in the moment...so use your time wisely & enjoy doing so.
- Share your ambitions with others.
- Multiply your positive energy.
- Plan a weekly, monthly, and annual review of your progress.
- Establish a visual depiction of your legacy theme and display it prominently.
- Remain flexible with others. Seek first to understand them.
- Know yourself well. And as you evolve, meet yourself again.
- Identify what best motivates you. What lights your fire? Repeat it!
- Have a long-term goal to steer towards.
- Daily focus is on taking steps...ground rush comes much later.
- Know the process is a cycle that repeats...it's part of the journey.
- Create some magic.

God bless you for your *initiative & effort* to engage in a brighter future for your grandchild.

Please send us your feedback & share your ideas...

www.lovemygrandchild.com/sharethemagic.html