

Create Legacy

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A thoughtfully constructed guide to leaving a legacy.

I was struck by “the power and importance of legacy” by three events: the birth of my granddaughter, learning I had cancer, and the discovery of old coins collected by me, my wife and our parents. This led me to formulate a process for creating a legacy “focused on helping future generations avoid missteps and guiding them with the knowledge and heritage of past generations.”

In this book, I discuss the meaning of legacy and then explore the effect one’s ancestors can have on future generations through a novel example: Barack Obama. “It was a very complex legacy provided from two different continents.” “Such a rich legacy our president was given by those who came before him.”

Next, I cover the benefits derived from creating a legacy, guiding the reader through the legacy creation process: how to decide on scope, determine themes and recipients, select gifts and create action plans, etc. I describe how to use coins as the basis for an ongoing collection that both represents our family’s history and provides an opportunity to educate my granddaughter about such good ideas as investing for the long term.

Included in the book, and included on this webpage are useful

forms—input worksheets and legacy theme worksheets—to help facilitate the creation of a legacy plan. I have included my own family legacy plan as a detailed example for readers.

Clear, concise, and well-written; a finely crafted manual offering instructive and valuable assistance to those who want to leave a lasting legacy





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