

YOUR NEXT CHECKERED  
FLAG: THE ULTIMATE  
JOY RIDE

SHARING YOUR GIFTS WITH OTHERS

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*Your Next Checkered Flag: The Ultimate JOY Ride* —  
**Sharing your gifts with others**

**Bill Matthews**

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## ACKNOWLEDGMENTS

This book is about the JOY that comes from sharing your gifts with others and, in the process, creating your own personal legacy. Therefore, it's important for me to recognize those who have so unselfishly shared their time, talents, and treasures with me. They're mentioned in the order in which they entered my life, but no matter when our paths first crossed, they have each made a lasting impression on me.

My parents, Howard and Anna, started things off for me a long time ago, and were the cornerstones of an incredibly solid and closely-knit family.

My dad ran a food market during most of his life, where he mentored countless high school and college students, many of whom later told our family that he had been a father figure to them. He loved what he did, starting with his first grocery store job at age 12, and ending with his retirement

after very effectively running a supermarket at age 79 --- sixty-seven years in the same industry, and sixty-five of those years with the same company.....WOW! While he often worked 70 to 80 hours a week, he managed to spend every other available hour with his family, teaching all of us about keeping our priorities in order.

My mom was a teacher. As was the case with my dad, over the years we heard many stories of heartfelt appreciation from my mom's former students. Fortunately for those she taught, and for her own children as well, my mom had a knack for simplifying difficult concepts so that her students could more easily understand and relate to them. In addition, she had a very positive outlook on life, a winning smile ("Smile Queen" at Kent State University), and was a gifted writer, poet, and artist. I learned to share her love for writing, although she could never understand why a guy who didn't like to *read* books would ever bother to *write* one!

I was blessed with two older sisters, Jane and Margie, who were both focused on helping others, and who pursued careers which did just that. Jane became a geriatric nurse where she very compassionately tended to hundreds of patients who were nearing the ends of their lives. We were truly blessed that she also looked after our own parents during their final years, a gift for which I'll be forever grateful. But her legacy extended far beyond the care she provided for our parents; indeed, she cared so deeply about her patients and their families that her job became a ministry to her, and a wonderful gift to those in her care.

Margie, who was one year ahead of me in school, became a highly-respected and award-winning elementary school teacher whose students truly loved her. She and Jane both created wonderful legacies by the way they touched their students and patients. It was actually an event in Margie's life, which I will describe later, that became a huge wake-up call for me, and an inspiration to write about legacies.

As I left college, three gentlemen shared their gifts of wisdom with me - John McVay, Bill Hoben, and George Matlin. A football coach, a University Dean, and a Statistics Professor all played a part in my being granted a graduate assistantship and, ultimately, landing my first real job. Over the years, the three of them also helped countless other former students and players like me. Their legacies of genuine helpfulness extended far beyond their job descriptions.

It was at my first job that I met Janet, who later became my wife. Janet has been a steady source of faith, and my guiding light for more than fifty years. She, her parents, and her sister, Connie, were inspired by Janet's grandmother who, during the Great Depression, put the family's last dollar in the Sunday collection basket with five children to feed, and a husband who was without a job. The next day her husband was hired by a local bank.

Janet's incredible faith has helped me make career decisions that have puzzled many others in my life. People have often asked me, "Why are you walking away from *this* to go do *that*?" I'm happy to say that her encouragement and insight

have always led me to a better place. It's no surprise that this same faith has been passed along to our four sons, all of whom are doing what they want to do with their lives. Urging people to have the faith to do what they love is certainly a key component of Janet's legacy, and is a major reason why there are a lot of happy people in our family!

It's very gratifying to see the legacies that our four sons and their wives are now creating, even though they may not yet be fully aware of it. Bob & Tara, Todd & Candice, Kip & Niki, and Trent & Sarah are wonderful parents to our grandchildren, imparting solid value systems that are wrapped in a warm blanket of love.....gifts that our grandchildren will make part of their own lives, and the lives of those they touch during the years ahead, no matter what careers they choose.

I'm also truly grateful to Clay Mathile, who gave me the opportunity to work with so many business owners during my years at Aileron. Clay's generosity and passion for the private enterprise system have been an inspiration to me, and to the thousands of business owners who have participated in Aileron's programs.

In addition, I want to recognize two of my colleagues for the help that they've provided along the way. Dave Sullivan has given me a truly innovative perspective on professional management, and is the most talented facilitator I've ever encountered. It was John Armstrong who repeatedly urged me to publish my works after I retired.

Finally, I want to thank the hundreds of business owners who have placed their trust in me by asking for my advice and guidance over the years. Many of them are creating their own legacies by sharing their time, talents, and treasures with their families, friends, employees, customers, vendors, communities, and others.



## INTRODUCTORY THOUGHTS



While I'm certainly a strong advocate for sharing your time, talents, and treasures, I must admit that I'm not fond of the phrase "giving back" when describing a legacy, since it conveys the idea that you took something, or that you need to return a time, talent, or treasure to those who passed them to you as gifts. While we're all very grateful for what we've

received, and for the people in our lives who have made those gifts possible, the objective is to do the same for others by passing things *forward*, not by giving them back. That's how a legacy works!

According to William Shakespeare, "The meaning of life is to find your gift. The purpose of life is to give it away."

I really like old Bill's perspective. Many of us understand the value of the second part, giving our gifts to others. However, we often struggle with the first part, since we might not be sure what gifts we actually have to give! Rest assured that we all have gifts to share with others, even though they vary a great deal from one person to another. The question is whether or not you're actually *sharing* those gifts with others.

If I asked 100 people on the street whether they thought it was important for them to leave the world a better place than when they entered it, I'd be surprised if any of them would disagree. And I'd also wager that all 100 of them, in their own ways, are already doing things in their lives to make a positive difference in the world - some of them big things, and some of them not so big.

Linda Ellis wrote a poem called "The Dash." It focuses on the horizontal line (dash) on a tombstone between the year someone is born and the year they pass away. In essence, the dash represents a person's life, and reading her poem causes us to reflect on how we've been spending our time on this earth. After further thought, it occurred to me that perhaps there should be a second dash; that is, maybe people should



also be adding a dash *after* the year they pass away, an indication of the how long their lives have impacted the world after their death. This second dash would be short for some people, and longer for others.

This is not to imply that legacies don't begin until after we pass away. Indeed, we're creating legacies throughout our lives, and many people are benefitting from what we share in our day-to-day activities, regardless of the magnitude of those gifts.

Remember that even little things can often make a significant difference. In fact, sometimes a simple act of kindness can actually turn into a legacy. It might be the bank teller who has been lifting your spirits for many years by the way she greets you every time you enter the bank. You look forward to it, and you've come to expect it with each visit. You know that she absolutely *must* have some bad days in her life every now and then, but somehow her uplifting attitude never wavers.

Whether you realize it or not, the bank teller is making a lasting impression on you, and perhaps providing you with the patience to treat others in a similar way, even when the events of your life might be dragging you down. In addition, there are likely many others who have received her simple gift and are passing that kindness along to those in *their* lives. The seemingly small gift shared by the teller is having far-reaching positive effects on the lives of many people in all walks of life, just because they've walked through the door of that bank.

If you don't define and plan what you want your legacy to be, it's less likely to have the lasting effect that you would like. It might still happen, but not exactly the way you had hoped. It's a lot like planning every detail of your wedding versus turning all or part of the planning over to someone else. The wedding will still happen if you delegate the details to others, but the event might not be quite as memorable as you had intended.

Leaving a legacy involves various combinations of three key components – time, talents, and treasures (“the three T’s”). If you're sharing your talents, you're probably sharing your time as well, since it typically takes time to share your talents. “Treasures” are most often interpreted as tangible gifts or things that are financial in nature. We all have time and talents that can be shared, but the significance of our treasures can vary widely from one person to another.

Regardless of what combination of the three T's are involved, the passing of a legacy is often done very quietly by everyday people, with no fanfare, and without any thought of the lasting effects that their activities will have on others. I like to think of it as “fame without fanfare.”

To illustrate the concept of fame without fanfare, I want to briefly describe a very personal experience, since it turned out to be a game-changer for me. In the “Acknowledgments” at the beginning of this book, I shared information about my parents and sisters, and the great family life that I've always enjoyed. This particular example involves my sister, Margie, who chose teaching as a profession.

Margie was always an extremely humble person. As adults, she and I lived in different cities, but I knew she was a very dedicated and highly respected elementary school teacher, having received “Teacher of the Year” accolades and other honors. However, it wasn’t until December, 2011, that I became fully aware of the lasting impact that she had made on her students.

She had retired a few years earlier, and stayed trim by continuing a very active lifestyle. She was involved in biking, yoga, and was still a talented tennis player. Since she loved teaching so much, during her retirement years she decided to continue pursuing her passion by tutoring students in her home.

One December evening in 2011, my cell phone rang and Margie’s name appeared on the screen as the caller. I answered with some sort of jovial remark as I often did, only to hear the voice of her husband, Rick, on the other end. Rick and I have known one another since high school, and he’s been like a brother to me. He was using her phone to call me, and I could tell by his voice that something was very wrong.

With great difficulty, Rick informed me that Margie had suffered a massive stroke due to a brain aneurism which ruptured and rendered her unconscious. It was perhaps fitting that this tragic sequence of events occurred only minutes after tutoring one of her favorite students. She never regained consciousness, and passed away peacefully the following week.

It was a very difficult time for all of us who were so close to her. The lines at the funeral home were incredibly long as people waited for hours to express their condolences to Margie's loved ones. I can't imagine that the people who ran the funeral home had ever seen a crowd that large. For those of us in the receiving line, the hours went very quickly as we heard so many stories about the positive impact that Margie had made on their lives, including many who told us that they had become teachers because of her.

At the school where she had taught, the windows of the building spelled-out a loving message to her in huge letters.

Margie had left a lasting legacy without ever intending to do so. She simply wanted to make a difference in the lives of her students... fame without fanfare. It was very shortly after her untimely death that I became much more focused on ways that I could make a positive difference with my own life.

Obviously, the story about Margie is a very important one to me as it relates to the idea of a personal legacy, and the concept of fame without fanfare. If you don't have a story like that in your own life, there are certainly others that you've observed. You're probably familiar with Mother Teresa, who humbly worked with the sick and poor in Calcutta and received the Nobel Peace Prize in 1979. She certainly operated without fanfare as she did her work very quietly, helping one person at a time.

A friend of mine shared a personal story about meeting Mother Teresa that very vividly demonstrated her humility.

My friend had been stationed in Rome, and was called to a meeting at the Vatican where there were a number of very influential people in attendance. He entered the meeting room, sat down in one of the many chairs, and waited for the others to arrive. Before all the chairs were filled, Mother Teresa entered the room. However, unlike the others who were there, she chose to sit on the floor instead of a chair. It was likely something that she didn't even think about, but her humility certainly made a lasting impression on my friend.

It's not difficult to find examples of people who have given of their time and talents, or who have shared their financial treasures, but it's a little tougher to identify situations where someone shared *all three* of their T's. So, here's a wonderful example involving a woman who had a significant fortune, and elected to give away her time, talent, AND immense treasures to make a difference in the world. Many people are not familiar with Katherine Drexel of Philadelphia, although you might recognize the name Drexel if you've been around Philadelphia. In 1891, when \$20 million was worth many times more than it is today, Kathleen used her entire treasure to start the Sisters of the Blessed Sacrament. She was just 30 years old at the time. Because of her generosity and passion, from that point forward, Katherine and the other nuns devoted their time and talents to serving the poor.

There may be times when we encounter people who seem to have ulterior motives for giving, especially those who make large financial gifts to a worthy cause and want everyone to be impressed by what they've done. Granted, it's often diffi-

cult for someone to make a significant contribution and still keep it a secret. However, there are occasions when we might get the feeling that someone is sending the message, “Look at me, and how generous I’ve been.” It may not seem as “pure” as the gift from an elderly widow who gives 10% of her fixed income, but we need to be grateful when any contribution is made for the benefit of others.

The point of all this is that there are gifts being given to us, and to those around us, every moment of every day. Those gifts take many forms, from simple acts of kindness, to overwhelming outpourings of time, talents, and treasures for the benefit of expansive groups and geographies. And, whether we realize it or not, we’re part of that giving and receiving, and might already be in the process of passing on our own legacy to others.

That brings us to the title of this book, *Your Next Checkered Flag – The Ultimate “Joy” Ride*.

Life is frequently compared to a race, and we often find ourselves competing for a checkered flag that, to us at least, will make us feel that we’ve achieved success, even though the definition of “success” varies widely from one person to another. That’s what defines the dash between the day you were born and the day you die.

However, what about the second dash, the one that determines how lasting your impact will be after you leave this world? If you truly want to make a more lasting impact with your life, *you should focus on your next checkered flag long before you capture your first one*. As you make your journey

toward the next checkered flag, it involves sharing your unique gift(s) with others. In return, you'll experience a great sense of personal satisfaction for having done it – and you'll soon understand why it will be *“the ultimate joy ride”* for you.

With that thought in mind, as you move on to the next Chapters it may be helpful to know that the purpose of this book is four-fold:

- To increase your level of awareness regarding legacies.
- To provide you with a blueprint for defining and transferring your own unique legacy to others.
- To encourage you to take deliberate steps now so that your legacy becomes what you intend it to be.
- To help you feel the deeply-rooted joy that comes from capturing *your next checkered flag...the transition from “making a living” to “making a difference.”*

We all have something to share with others, but remember that it doesn't really become a gift until we give it away!





THE IMPACT OF YOUR BEHAVIOR:  
LASTING IMPRESSIONS



For givers, passing legacies to others is not a difficult concept to grasp, but the way in which legacies are eventually transferred to others can be extremely complicated. For example, you might pass your legacy on to just one person, and maybe that recipient will pass it along to just one additional person. However, along the way it's very possible that

the one person who has been the recipient will be in a position to pass it along to countless others, maybe at the same time, which can dramatically accelerate the transfer of that legacy and its ultimate impact.

I witnessed this phenomenon first-hand when I realized how my sister Margie's love for teaching generated a multiplying effect on the number of new teachers entering the profession. Many of those teachers are now, in turn, inspiring their own students to pursue teaching as a career.

The complexity of the process is actually the beauty of it, since a single gift passed on to just one person can be multiplied and accelerated countless times for the benefit of current and future generations. It's a wonderful example of the term "snowball effect."

While our focus here is to approach the topic of legacies in a very organized and deliberate way, the majority of legacies are passed on to others with little or no structure or formal planning. They just happen, and in some cases, two receivers can interpret the legacy of a single individual in two entirely different ways. Indeed, *our day-to-day behavior can make a lasting impression on others – intended or unintended!*

To illustrate, I once worked for a gentleman who had been named by Fortune Magazine as one of the ten toughest bosses in America. I was still in my mid-30's, and he was near retirement. My office was not far from his, so I interacted with him fairly often. His management style and

demeanor certainly qualified him for making Fortune's list, and many of my colleagues would wholeheartedly agree that this was a fitting description of his legacy.

However, during and after my years working with him, I found him to be a very caring individual who appreciated and respected my input. If I had a different perspective on a particular decision, I learned to always back-up my position using facts, and to express my views in a one-on-one meeting with him rather than in a group setting. After he retired, he invited me to join him in a small entrepreneurial venture, and we remained friends until his death. From my perspective, his legacy was quite a departure from the one perceived by my colleagues and the readers of Fortune Magazine!

When we give of our own time, talents, and treasures, we typically do it because it's something that we truly want to do without any ulterior motives. That's why it's such a pleasant surprise for the giver to receive a great and unexpected gift in return...JOY, which is the genuine feeling of peace and personal satisfaction that comes back to the giver.

Maslow wrote at length about what he called "self-actualization," which was at the top of his Hierarchy of Human Needs. It's similar to the feeling of JOY we receive after having shared our gifts with others.

You might already be creating your legacy, and not even realize it. Or, you may be waiting for the right time or oppor-

tunity to consider your next checkered flag. One way to determine if you've begun working on your legacy is to ask yourself whether or not you've had "a moment of JOY." If so, then you've probably already shared at least a little of your own legacy.

So, what happens when someone definitely does *not* want his or her behavior observed, and takes extreme measures to remain as private as possible?

I had the opportunity to observe exactly that type of situation, and the surprising result, as it unfolded before my very eyes. It involved a homeless man in Dayton, Ohio, who came into my life, and the lives of many other people in Dayton, and dramatically changed our perception of homeless people. He was brought to us for a reason, and I doubt if he ever gave a second thought to how his life was affecting us. All he seemed to care about was being unnoticed.

No one knew his real name, but everyone called him "Rags." He walked the streets of downtown Dayton for many years with his "signature" attire --- his feet wrapped in rags, and often wearing a heavy overcoat. He rarely spoke, and almost never spent the night in a homeless shelter. While people sometimes offered him food or money, I never saw him ask for a hand-out, and I never had a reason to believe that he was a substance abuser. He seemed to like sitting near the library, but also enjoyed walking.

Rags became a mystery man to those of us who saw him. The word on the street was that he preferred not to talk to

anyone, and would certainly never reveal who he was or how he had become homeless. Therefore, rarely would anyone try to engage him in conversation for fear that they might offend him or be rejected. I must admit that I, too, failed to reach out to him, other than to acknowledge that I knew he was there.

One day in May, Rags collapsed on the street and passed away very quietly, probably just the way he had hoped to leave this world, without any fanfare. However, the events that followed were dramatically different than he would have intended.

The police eventually learned that his name was Elias Baraukas, and that he had come to Dayton from Connecticut. One of the churches in downtown Dayton, with the help of financial contributions from many of those who were total strangers to him, arranged for a fitting funeral and burial. The funeral service was elaborate and the church was packed. Somehow this humble and very private man had quietly made such an impact with his life that the service was televised nationally on the CBS show, “Sunday Morning.”

On the 30<sup>th</sup> anniversary of his death, *The Dayton Daily News* published another story about his life, which rekindled his legacy in the minds and hearts of those he had touched so long ago.

No matter how hard Rags tried to go unnoticed, the world around him was watching. To this day, I’m not exactly sure

what gifts he unintentionally gave to those around him. Perhaps he taught us to respect the privacy of the homeless, or maybe he really believed that his death would bring complete strangers together to respect and celebrate his life at his funeral. One thing is for sure, the people around him observed his behavior, no matter how hard he tried to conceal it. That's a lesson for all of us, particularly as it relates to leaving a legacy.

While Rags might be an unusual example, his life reminds us that we can be affected in very strange ways by people whom we've never even met. However, it seems like the legacies that are strongest, and most enduring to the recipients, are those that are passed along to us personally by family members. Somewhere in between our family members, and those we've never met, there are countless friends and acquaintances who are creating legacies that we can regularly observe first-hand.

Here are just a few examples of people whose behaviors I've observed in my own life. Each has left a lasting and positive impression on me, even though they've never sought or wanted recognition:

- The teacher who cared so deeply about each of her at-risk high school students that she worked tirelessly with local businesses for many years to find them meaningful jobs that could develop into long-term careers.
- The gentleman who mentored numerous young urban men by volunteering as a Big Brother over a

period of many years, inspiring some of them to do the same when they became adults.

- The executive who left a successful business career, long before retirement age, to become a teacher in a school that serves economically disadvantaged teens.
- The neighborhood couple who took-in several foster children over the years, sometimes two children at a time.
- The homeless person who somehow emerged to launch a not-for-profit organization to train hundreds of troubled teens in a variety of skilled trades.
- The farmer who quietly paid the tuition for many seminarians.
- The successful business owner and military veteran whose love for his country drove him to sell his business and become a United States Congressman.
- The executive who provided weekend counseling and spiritual guidance for prisoners in a maximum-security facility, with all the doors locked behind him after he entered.
- Multiple executives, nurses, and physicians who have made annual trips, at their own expense, to provide professional help to the impoverished in third-world countries.
- Various business owners who hire those who have been released from prison, and in some cases provide housing for them.

- The couple who adopted five brothers and sisters so that the five siblings could all be raised together in the same family.
- The company whose employees provided a team of helpers to less fortunate local residents living in homes that were in need of repair and maintenance.
- The musicians who volunteered to play old songs during weekend performances at nursing homes, inspiring other musicians to do the same in surrounding communities.
- The youth track coach who has been working with kids for more than thirty years, and whose former team members are now doing the same for a new generation.
- The business owner who regularly hires new employees from the local “half-way” house that works with former substance abusers who are genuinely dedicated to improving their own lives.

You don't need to abandon your “day job” to begin building your legacy. If you can't afford to quit what you're doing to fully pursue your legacy, figure out another way to begin rather than waiting. Some of the examples above include people who are sharing their legacies and enjoying their “moments of joy” by using evenings, weekends, and vacation time. Others have found creative ways to transfer their legacies while they're on the job. Either way, *they're creating lasting impressions with their behaviors.*



There are also numerous charitable organizations who would love to have more volunteers, and there's probably at least one in your community that aligns with your passion in life, whatever that might be. Or, there could be situations in your own neighborhood where a seemingly small act of kindness could make an immediate difference.

I remember watching national TV coverage of Hurricane Harvey after it hit Houston. Amid the tragedy and devastation emerged many acts of kindness. One I remember vividly is the woman who visited a Houston shelter with her two preschool-age daughters. Their family had escaped the devastation, so the three of them stopped by a fast-food restaurant, bought some meals, and delivered them personally to a woman and her four-year-old daughter who were staying at the shelter.

The three children immediately played together as if they were life-long friends, and their mothers instantly bonded before the TV camera. The lady conducting the interview was deeply moved by what was taking place before her eyes, particularly when one of the small girls handed her a French fry. The entire encounter unfolded in only a few minutes, and certainly wasn't planned, but that simple act of kindness demonstrated by a woman and her two daughters was witnessed by millions. It was an event that probably inspired many viewers to help the victims whose lives had been upended by Harvey.

Simple acts of kindness can create wonderful memories for both the givers and the receivers. For some, those acts are

repeated so many times that they can actually become legacies. For example, it might begin by you helping serve meals to the needy at a soup kitchen, and eventually lead to you opening a soup kitchen as part of your own legacy.

You may have read about the twelve-year-old boy whose simple plan was to honor war veterans by placing flags on their graves, which led to a major effort to place flags on thousands of military graves around America.....all because that young man saw an opportunity to make a difference, *and acted on it.*

A woman told me recently about a simple act of kindness that has become a routine for her. She travels extensively as part of her job. After one particularly long day that included a three-hour airline trip, she stopped by the airport restroom. She was pleased to see that the restroom was spotless, as the attendant was just completing her cleaning duties. When the weary traveler was about to leave the room, she stopped to personally thank the attendant for doing such a nice job. The attendant was overcome with emotion, providing the woman with a “moment of joy,” all because she took the time to say a simple “thank you.” Although that initial incident happened nearly twenty years ago, each time she encounters a restroom attendant during her travels, she still expresses her gratitude.

For owners of businesses, there may be opportunities to share legacies with employees every day. Many organizations provide tuition reimbursement programs for employees

who are taking classes to improve their on-the-job skills, and there are some who pay for ANY type of education that will help employees reach their full potential, even if the training and development has nothing to do with day-to-day job responsibilities.

As you think about your next checkered flag, remember that your behaviors are observed by others, and you have plenty of opportunities to make *lasting impressions*, positive or negative, intended or unintended.



HOW YOU'LL KNOW WHEN YOU'RE  
READY TO SHARE



While it might not be the most accurate or realistic depiction of our time on this earth, our lives are often compared to a race. At funerals, there are sometimes readings or recitations that refer to having “run the good race.”

Our focus here is not on the day-to-day “race,” but rather on the next checkered flag – your transition from “*making a living*” to “*making a difference*.” It’s the personally fulfilling journey that involves sharing your gifts with others, while receiving genuine joy for having done it --- “the ultimate joy ride!”

How and when does this transition occur, and why does it happen very early in life for some people, and perhaps never for others? Some believe that life is divided into three stages of widely varying lengths, and that we take a step closer to our next checkered flag as we go through each stage.

- The first stage involves the accumulation of knowledge, experience, and basic value systems during the early years of our lives. These come predominantly from our family, friends, neighbors, and the schools we attend.
- Next, we hold jobs, raise families, enjoy some successes, and learn lessons from failures, all the while accumulating wisdom and wealth to various degrees.
- At some point, we become more aware of the people around us whom we would like to help. We begin to share the gifts that we’ve been given, comingled with the ones we’ve developed on our own during the first two stages. This is the point in life where we are more apt to be mindful of leaving a legacy.

Sometimes the transition from one stage to the next is a bit blurry, but the shift still occurs. These stages of life are not equal in length or intensity. For example, some people reach the third stage at a much earlier age than others, like Mother Theresa who began helping the poor in Calcutta at a very young age. Others might not reach that stage until very late in their lives, if ever.

Occasionally there are events that can disrupt the normal evolution of these three stages, like young entertainers, professional athletes and others who have accumulated significant financial resources at a very young age. For some of them, their “sudden wealth” has arrived long before they possess the wisdom to know how to handle it. This can be made even worse by the fact that many of them have not yet developed the insight to recognize genuine friendships, or to select qualified, objective advisors who can help them make sound decisions about their finances and future well-being. Bad decisions can be minimized or avoided if they would have had more years to accumulate the necessary wisdom to make good choices.

This does *not* mean that older people are always wiser than younger ones. The point is simply that wisdom seems to increase as our life experiences grow in number and variety. These experiences include not only our own successes and failures, but also the successes and failures we observe among those around us, and the ones we read about or see in the news or movies. It’s often been said that the definition of insanity is doing the same thing over and over, but expecting different results. Said differently, the wise person is less

likely to make the same mistake over and over because of the lesson learned after making the mistake initially.

How does a preschool student get a report card that says, “Does not share well,” and later create a not-for-profit organization whose sole purpose is to help others? Somewhere along the way, that person’s value system and behaviors evolved from selfishness to selflessness. That is, most of us *move from receivers to givers* at some point during our lives.

Our evolution from “receiver” to “giver” can be observed in a variety of behavioral changes, some of which are listed in the diagram that follows. Note that each of us will be at a different point along the lines shown. Early in our lives, we tend to be near the far left, but as we grow older, we move further to the right.

THE JOURNEY FROM “RECEIVER” TO “GIVER”

<u>Receiver</u>		<u>Giver</u>
Dependent	.....>	Independent
Naïve	.....>	Wise
Unappreciative	.....>	Grateful
Selfish	.....>	Benevolent
Insensitive	.....>	Empathetic
Egotistical	.....>	Humble

While this list could go on and on, it provides a sense of the growth that takes place within each of us as we live, learn, and ultimately share with those around us. Whether it be a



simple act of kindness, or a lasting legacy, as we move from left to right, we are more apt to make a difference in the lives of others.

*The Two Readiness Factors...Control and Awareness*

To illustrate the personal journey in another way, below is a general description of how we establish our personal priorities and allocate our time as we mature:

- Early in life, a large percentage of our time is focused on what we do day-to-day, while a smaller percentage of effort is spent on making the world a better place.
- As we mature, we gradually begin to shift more and more of our focus to making the world a better place.
- At some point, a smaller percentage of our time is focused on what we do day-to-day, while a larger percentage is spent making the world a better place. This is the stage when we tend to have greater CONTROL over our lives, more AWARENESS of the unmet needs around us, and are therefore more willing and able to help others in some way. NOTE: When you reach this stage of life, you are much more prepared to consider *Your Next Checkered Flag*.

Although the example above often correlates closely with our age, it's important to keep in mind that some people reach the third stage while they're still relatively young. What is it, then, that makes some people *ready* to share at much younger ages than others, and why do they sometimes abandon very successful and lucrative careers to pursue things that they believe will make the world a better place? What moves people from the mindset of "making a living" to "making a difference?"

The answer is that the process is more likely to begin after you have *control* over various parts of your life. There is sometimes a misconception about control, since many believe that you never have control over your life unless you have financial security. Although financial security can certainly make it easier to focus on sharing your gifts with others, the lack of financial security should never be an excuse for postponing your legacy. Indeed, if you look around, you'll see that there are many legacies being created by people who are far from financially secure, but who are giving freely of their time and talents to make the world a better place.

While there are certainly exceptions, the factor keeping most of us from ardently pursuing our legacy is that we have to "make a living." Whether you're employed by an organization, own your own business, or devote your life to running your household, you probably know how quickly the demands of your daily duties can take control of your life. I've observed this occurring with people all around me, and have also experienced it myself.

With more control over your personal life, you'll not only find more time for family and other interests, but will also be more apt to notice certain situations around you where you could be of help. Those situations may have always been there, but there was never time to think about ways you could lend a hand. It's the beginning of *a personal transition from "making a living" to "making a difference."*

But what about the people who are in control of every aspect of their personal lives, yet still haven't taken any significant action to make the world a better place? In those instances, it's often the fact that they're so busy or focused on certain parts of their own lives that *they're not aware of the opportunities around them where they could be of help*. They're not intentionally ignoring the needs of others, but simply haven't yet noticed.

The awakening for many occurs when a family member or close friend encounters a situation involving a need that can't be ignored, or they observe someone close to them who has demonstrated a genuine, unselfish behavior to help another.

Here's an example of how one woman, who had her life under control in every way, suddenly became aware that it was time to do something for others. In her case, it involved sharing her financial treasures initially, but later evolved into much more.

She regularly traveled to different states as part of her job. Every now and then her mother would hand her a sealed envelope before a trip, and ask her to mail it after she arrived

at her destination. When she asked her mother why none of the envelopes ever had a return address, her mother told her that she wanted each note to be a surprise when it was received, but she never provided her daughter with any more details.

After her mother's death, the daughter found some notes and a ledger revealing that each of those envelopes contained cash, often a significant amount, and they were sent to people that her mother wanted to help. She didn't want the recipients to know where the gifts had come from, so mailing the envelopes with no return address, and with postmarks from other states, helped protect her anonymity. Learning about her mother's quiet generosity was truly an inspirational revelation!

To learn more about her mother's motives, the daughter began by investigating who was receiving the cash that was being mailed. As part of her investigation, she approached her late mother's sister to see what she could find out. She learned that two of the recipients were former members of her mother's church, who both still lived in the area; hence, the reason why her mother wanted the envelopes to be postmarked from other states. One was a lady who cleaned houses, and who had an autistic son. The other was a young man from a very poor family who was working two jobs and attending night school to get a degree in business.

While the daughter never actually met either of the recipients of the money, she became fully *aware* of the reason her mother had chosen to very secretly help these two people. In

addition, she was able to quietly follow their lives, and continued to mail cash to each of them, just as her mother had done. Eventually she hired the woman to clean her own house, and asked her employer to hire the young man as an intern at her company, all the while continuing to send each of them cash anonymously.

If your life is under *control*, and you're *aware* of ways that you can help make the world a better place, you also know that there are plenty of ways to do it besides sharing your financial treasures.

While giving of your financial resources is a key component of making a difference, the majority of legacies involve “*sharing what you’ve learned, versus sharing what you’ve earned.*” Sharing what you’ve learned means more than simply imparting knowledge to others, much like a teacher provides instruction regarding a specific subject area like math, science, or language arts; it includes passing along the *wisdom* that you’ve gained from your positive and negative life experiences, which goes way beyond *knowledge*.

When someone is being paid to provide help to others, like an EMT, it might feel as if their gift is of less value to the recipients because it's not being done voluntarily. Rather than dwelling on the negative, remember that most of us have to make a living. The key is that the receiver benefited from your gift, and that someday you'll have the opportunity to share your time, talents, and treasures *without any financial compensation or recognition*.



## PHASE I – GETTING STARTED



Based on the previous Chapter, it should now be abundantly clear that you'll be much more successful at making the world a better place if you first have reasonable *control* over your life, and have also become *aware* of specific opportunities where you can be of help.

In addition, it's important to remember that we're all leaving our marks on this world – some large, some small, some positive, some negative, some intentional, and some unintentional. We each have an opportunity to decide what our legacies will be, and to act accordingly.

Passing on a legacy may seem as simple as sharing your unique gifts with others, but there are many moving parts involved. We'll now begin to describe the process using five major, sequential phases, and a number of sub-steps to be covered in detail through the remainder of this book.

#### Phase I: GETTING STARTED (This Chapter)

- Set aside time to think
- Identify your unique gifts
- Be thankful for the gifts you possess

#### Phase II: ESTABLISHING THE BOUNDARIES (Chapter 5)

- Create your personal vision
- Record your personal values

#### Phase III: DECIDING WHAT TO SHARE, AND WITH WHOM (Chapter 6)

- Describe how you want to be remembered
- Decide what gift(s) you want to share



- Identify the intended recipient(s) of your gift(s)

#### Phase IV: PREPARING FOR IMPLEMENTATION (Chapter 7)

- Identify potential obstacles
- Determine success factors so you'll know when you've met your goal
- List ways to prolong the impact of your gift(s)
- Develop a three-year budget
- Establish an implementation schedule

#### Phase V: MAKING IT HAPPEN (Chapter 8)

- Distribute your gift(s) to the intended audience according to the implementation schedule
- Monitor the success of implementation, and experience the deeply-rooted joy that comes from having shared your gifts with others.

In this Chapter, our focus will be on Phase I of the process, Getting Started. We'll begin with the first step of Phase I, which is setting aside time to think.

#### SET ASIDE TIME TO THINK

Before making the decision to move forward with the process, it's important to take the time to consider whether or not you want to make your legacy a priority. Many people prefer to simply live their lives as best they can, be good to

others, and let their legacy happen on its own, whatever it turns out to be. This is perfectly fine.

The key point here is to take the time to at least think about it. You might find it helpful to go somewhere quiet, either alone or with your spouse/loved one, and talk about your life. Keep in mind that this exercise is not intended to focus only on what people will remember after your death, since you can be creating and implementing your legacy while you're still very much alive!

During this very first step, it may be helpful to ask yourself some basic questions like:

- What do others say about me today?
- How have I helped others?
- Have I shared my time, talents, and treasures to the extent that I could?
- To be able to call my life successful, what will I have to accomplish?
- Does my life have a purpose?
- If my life was summarized in a brief video, what would the highlights be to date?
- If I knew I had one year to live, how would I spend it?
- What activity makes me forget that it's time to eat?

Conclude by writing the following:

- A brief summary of your discoveries.

- A list of action items, including whether or not you want to proceed to the next step.

## IDENTIFY YOUR UNIQUE GIFTS

Before you decide which gift(s) you would like to pass on to others, it's important to take a candid look at which ones you actually have to give. Some will be obvious, but others might be more accurately identified by seeking objective input from those who know you best. Here's a process to help you with this step.

*First: Compile a List of the Gifts You Possess....*

On your own, begin by compiling a list of the gifts you possess ---- time, talents, and treasures. As you prepare the list, you'll quickly figure out that you have to be selective so that the list is focused only on the key gifts, which are the ones that help determine who you are, and that make you successful in life, regardless of your career or calling. It can include all types of gifts, including your winning smile, sense of humor, or your positive outlook on life.

*Second: Get Input from Family and Friends....*

Next, extend the list by asking members of your family, and others who are close to you, to identify your personal strengths. Rather than have them give you a long list of things that will make you feel good, ask them what they believe to be the one, two, or three things that you do extremely well, or that they appreciate most. Their input will

provide you with objective, focused insight as you complete the list.

*Third: Refine the List....*

Examine the list, and eliminate as much duplication as possible so that you've identified the key underlying gifts that make you who you are.

*Fourth: List the Source of Each Gift....*

Next to each gift, list the source, or giver of that gift. This will involve some deep thought, since some of your key gifts may have been given to you many years ago. In a few cases, you might not be sure exactly where the gift came from, or the gift may have multiple sources. Just do the best you can.

*Listing the source of each gift will be an important ingredient before you proceed to the next step.*

BE THANKFUL

It's a WHOLE lot easier to get into the mindset of giving your gifts to someone else after you first take the time to be thankful to those who gave them to you in the first place. Yet this is the step that is too often skipped.

Expressing your thankfulness is actually the foundation of the legacy you create. The more thankful you are for the gifts that you've received, the stronger the foundation. As in the case of constructing a high-rise building, a solid foundation will accommodate a building with multiple stories. That

means your legacy is likely to reach more people, and for a longer time, if you've built it on a bedrock of thankfulness.

There is plenty of scientific research confirming that those who are thankful are much more apt to help others. Two noteworthy studies are detailed below.

In the first example, researchers from The University of Nottingham in England analyzed 91 different studies that included more than 18,000 participants, all dealing with the relationship between thankfulness and pro-sociality (the desire to do good for others). According to Psychology Today, here are some of their findings:

- There is a clear and significant link between thankfulness and behaviors that help society as a whole.
- When looking at a broad range of feelings and emotions, thankfulness had the greatest effect on peoples' willingness to help others.  
Thankfulness/gratitude ranked higher than sadness, happiness, empathy, shame, and anger.

The second study was conducted by Dr. Stephen Post, Professor of Medicine and Bioethics at Stony Brook University School of Medicine. According to brain scans, the mere *thought* of planning to help others will make people feel happier. In addition, here are his findings among the millions of Americans who volunteer their time to help others:

- 89% report an improved sense of well-being.
- 73% report lower stress level.
- 68% report better physical health.
- 77% report enhanced emotional health.
- 92% report an enriched sense of purpose in life.
- 96% report increased happiness.

Sure, we might be extremely grateful for the gifts that we've been given, but have we actually taken the time to say "thank you" to the givers of those gifts?

It's important to note that this step often causes people to reflect on factors that are not necessarily time, talents, or treasures that they've received, but which fall into a broad category of other "circumstances" in their lives for which they're very thankful. For example, you might be grateful that you live in a part of the world that allows you freedom, or in a neighborhood where you feel safe. While it's sometimes difficult to identify and thank the giver of those gifts, be sure that you never take them for granted.

You might be surprised that one or more of the gifts on your list are actually the result of an unpleasant experience in your life that involved someone whom you may have never truly forgiven. Despite the painful circumstances and memories, perhaps the lesson you learned from that encounter has given you a unique strength.

For example, consider Barry, a medical student who was regularly late for class. His professor was known to be a stickler on punctuality, and had called Barry aside privately

on two occasions to tell him that he needed to be on time. A few weeks later, Barry again entered the classroom a few minutes late. In front of forty of Barry's peers, the professor stopped his lecture and strongly reprimanded Barry for his continued tardiness. It was a very unpleasant experience for Barry, but made such an impression on him that, after becoming a medical professional, Barry was never late for a surgery, and became well-known and respected for his punctuality.

He knew the professor was right, but Barry still harbored ill feelings when he and the professor met at an alumni event ten years later. Barry had never forgiven the professor for that embarrassing moment, but on that particular day, at that particular time, he made the decision to thank the professor for the lesson in punctuality, a trait that he himself had now come to value. The two became friends and regularly visited with one another in the years that followed.

Assuming you've completed the list of unique gifts you possess, **make a special effort to pass along your personal "thank you" to those whom you believe were responsible for each gift.** This could take the form of a personal meeting, phone call, letter, or email, as long as it gets done.

If you're not able to attribute a key gift to a specific giver, or if the giver is no longer living, do whatever you feel is appropriate to genuinely thank that giver. It can be something as simple as a thought of thankfulness, or you might want to write a letter to that person, even though you never plan to send it. The idea is to reflect on, and be grateful for,

all of your gifts, and for the people in your life who have provided them for you.

The process described above will typically give you an *attitude of gratitude*, and will prepare you well for Phase II, Establishing Boundaries, which will be covered in the next Chapter.



## PHASE II – ESTABLISHING THE BOUNDARIES



From the previous Chapter, you have now identified your unique gifts, and had time to reflect on how grateful you are to those who have made them available to you. Now it's time to establish the boundaries that will guide you through the remainder of the process, beginning with your Personal Vision.

## CREATE YOUR PERSONAL VISION

Even if you choose not to formalize your legacy, you should have an up-to-date Personal Vision for your life. This is not an estate plan that is focused primarily on your tangible possessions, but your Personal Vision will likely interface with your estate plan at some point.

Creating a Personal Vision is a very private and confidential exercise. There's no right or wrong way to do it, nor are there any rules regarding what it should look like or how it should be formatted. The important thing is that it be in writing, and that you share it with those who are closest to you.

The process involves taking some private time to dream about what you really want your future to look like. Since your dreams can certainly change as your life unfolds, you should review your Personal Vision periodically and make any modifications that are appropriate.

If your Personal Vision includes your desire to make the world a better place, and you want to develop a specific plan to make that happen, then the remaining steps in the process will help you achieve that dream.

Here are two very different Personal Visions, one from John, and the other from Kathy. John has his own business and is nearing retirement, while Kathy is a retired postal worker. We'll be talking more about John and Kathy later. John's Personal Vision is a little more involved than Kathy's, but both are being presented here so that you can see how two different people have approached this step in the process.

*John's Personal Vision....*

John is a business owner and is married to Lori. They live in Pennsylvania, and have one daughter and one son. Their son has a degree in accounting, and has been active in the family business for seven years. Their daughter is married with children, and has declared that neither she nor her husband have any interest in ever being involved in the family business. They have settled in Austin, Texas.

John has already prepared a list of the gifts he has received during the Thankfulness exercise. He then prepared his Personal Vision by himself in his office one evening after everyone had gone home, thinking about his dreams for the future, and jotting down some notes.

After spending time alone, he wrote a draft of his Personal Vision. Although John's Personal Vision covered the rest of his life, he focused heavily on the first three years because of the significant changes that would be required very soon if he was to achieve his longer-term dream.

He shared the draft with Lori, and they set aside some quality time to discuss it. During their conversation, Lori confirmed that she would like to give up her duties as book-keeper at the company, and begin teaching English to adults in the community. In this case, John's Personal Vision and Lori's Personal Vision became a single document. This is not unusual, but keep in mind that they could have prepared separate documents reflecting each of their Personal Visions before meeting to share and discuss the details. If the Personal Visions are dramatically different from one another,

the discussion typically takes much longer, and can result in one or both parties modifying their Personal Visions so that they reach a common ground before sharing with other family members.

After their discussion, John revised the draft to reflect what they had agreed upon, and then John and Lori shared the document with their two children so that everyone in the family understood it. Following the meeting with their children, John and Lori each made a note on their calendars to review the document every twelve months, and to make any changes that might be necessary due to circumstances that may have occurred since it was last reviewed. Here's a copy of John's Personal Vision after everyone agreed:

*“In three years, I will have moved from the day-to-day leader of the company to Chairman, where my role will be the chief strategist for the organization, and the architect of the culture. I will then spend one or two days a week on the job, and will have relinquished the leadership role to a non-family President whose job will be to mentor our son until he is deemed ready to become President. We will have established a mechanism for our son to gradually purchase my shares as soon as he is ready to be named President, and will concurrently design a plan so that our daughter is treated equitably, even though she and her husband are not involved in the business.”*

*“We will own a condominium in Austin, Texas, and will choose a location within a half-hour of our daughter's home, preferably with a lake view. This will provide us with an*

*opportunity to spend time with her and her husband, along with our two grandchildren. We will also retain ownership of our current residence in Pennsylvania, which will have been renovated.”*

*“Lori and I will continue to spend time as volunteers at the summer youth program connected to our church. She will have relinquished her job as bookkeeper at our company and will begin teaching English to adults in our community through an outreach program, while I serve as a volunteer at SCORE (formerly known as The Service Corps of Retired Executives) one day each week assisting start-up businesses.”*

*“A perfect day would involve waking up to the warm sun, having brunch with Lori overlooking the forest behind our house, or the lake behind our condominium. Lori and I would then either ride our bikes, enjoy our pontoon boat, or take a long walk before touching base with our children and grandchildren in person, by phone, or by videoconferencing. As the day winds down, we would get a wonderful “thank you” note from someone who attended the youth camp or received help at SCORE, go to dinner with family or friends, and watch the sunset.”*

The Personal Vision above provides a very vivid picture of John’s dream, which has been shared with Lori and their two children. It includes the plans that John and Lori have for their own legacies, helping at SCORE, and teaching English. It will be up to each of them to determine exactly how much time they’re willing to devote to those activities if they’re

going to make the impact they desire. In other words, how much of their time and talents must they give if they want to make a lasting difference in the lives of the recipients?

*Kathy's Personal Vision....*

Kathy's Personal Vision has fewer moving parts than John's, since Kathy is a widow with no grandchildren, and whose unmarried daughter lives nearby. Kathy has already retired from the U.S. Postal Service, and her daughter prepares invoices at a local manufacturing company. Earlier in Kathy's life, she volunteered one Saturday per month at the local Children's Hospital by pushing patient wheel chairs when the children were ready to be discharged. She has also enjoyed crocheting for many years.

Like John, Kathy has already put together the list of gifts that she has received as part of the Thankfulness exercise. She then set aside time to think about her legacy, followed by creation of her Personal Vision listed below:

*When I helped at Children's Hospital many years ago, I thoroughly enjoyed seeing the smiles on the faces of the children as I pushed their wheelchairs to the area where their families were going to take them home.*

*I've also found it very rewarding to crochet, since it makes good use of my creative talent and helps me stay alert and occupied during my retirement years.*

*Looking forward, it would give me great satisfaction to crochet blankets for sick children at Children's Hospital, knowing that the blankets can bring continuing joy to them, and to their families, long after they return home.*

*It would be even more satisfying if others were interested in crocheting blankets for the children, and if I were able to teach crocheting to people who would like to make blankets for them. I've always enjoyed teaching others, and have a knack for making things simple, so teaching an occasional class at home would be wonderful.*

Now, using the guidelines and examples from this Chapter, create a draft of your Personal Vision, review it with those closest to you, revise it if necessary, and make firm plans to review it at least once each year.

## RECORD YOUR PERSONAL VALUES

We all have our own personal value systems, even though they vary significantly from one person to another. The objective in this step is to create a list of the values that are most important to you, and that you demonstrate consistently.

As you prepare your initial list, it will probably be lengthy, and many of the items might actually be different words that describe the same few underlying values. To simplify the process, try these two tips:

- Reduce the list to your five most important values. If you can do this, you're likely to find that most of the others on your original list are simply different words that describe one of the same five top core values you've identified.
- Then, ask yourself this question about each of those five key values, "Am I truly living them, or do I just think they're important?"

Resist the urge to beat yourself up as you compile the list. Remember that your focus here is on the values that you want to pass along to others, so the objective is to list only the good behaviors that you actually demonstrate day-to-day.

Knowing these answers will be crucial as you create your own legacy, since the successful transfer of your legacy to someone else will be far more likely if the recipients can genuinely observe your personal value system by the behaviors you demonstrate.

After you complete this exercise, you should have a very precise list of the values that are not only important to you, but also the ones that others recognized in the way you live your life. The list will include many of the items that you identified when completing the Thankfulness exercise.

To help you prepare your list, here are the Personal Values identified by John and Kathy.

. . .



*For John....*

In keeping with the previous example, after John created his Personal Vision, he then realized that he placed great value on the traits listed below, and believed that these were also the ones that he has consistently demonstrated in his life:

- Honesty
- Work ethic
- Positive outlook
- Empathy
- Compassion
- Dependability
- Reliability
- Balance between job and family

John was determined to reduce the list to “the top five,” so after spending some time reviewing it, he found that some of the items were actually *the results* of other intrinsic values he possessed rather than values in and of themselves. For example, because he had compassion for others, he was able to be empathetic, and because his work ethic was so strong, he was dependable and reliable. In addition, he asked a few family members and close friends to help him decide which of the values he demonstrated most strongly so that he could rank the list from top to bottom.

As a result of the additional screening process, John concluded that these were the five values that his behavior demonstrated most often:

- Balance between job and family
- Honesty
- Work ethic
- Compassion
- Positive outlook

As in the case of the previous steps, this information will all be considered when John defines the legacy he wants to share.

*For Kathy....*

Kathy went through the same process as John, but identified just four key values that she felt best described her. She asked her daughter for input as well. Together they prepared the following list:

- Compassion
- Kindness
- Creativity
- Ability to make things easy to understand

PHASE III – DECIDING WHAT TO  
SHARE, AND WITH WHOM



Phase III of the process is crucial, since this is where you actually get creative and specific about what you plan to share with others, and who those recipients will be. Before you can make that decision, you need to take a very introspective and candid look at how you want to be remembered.

## DESCRIBE HOW YOU WANT TO BE REMEMBERED

When you combine the information you've prepared in the previous steps with your answers to the questions below, it should help you determine how you would like to be remembered. Keep in mind that this is a goal that can be achieved long before your death, so it might even lead you to consider a career change.

- What do I want to be “known for” today, and tomorrow?
- Aside from my job, what activities get most of my time and effort?
- What am I truly passionate about doing?
- What “giving” activity provides me with the greatest feeling of personal satisfaction?
- If I was independently wealthy, what would I be doing?

If you find that the answers to all five questions are the same, or very similar, then you are well on your way to defining what you want your legacy to be. If not, you might actually be defining more than one legacy for yourself, which is not unusual. This is precisely what happened to John, as you'll see below.

*For John....*

John had originally thought his legacy would be to help prospective entrepreneurs at SCORE, but after going through the previous steps, he now found himself considering a second alternative --- teaching entrepreneurship to high school students near downtown where jobs were scarce and unemployment was high. It would still give him the opportunity to work with high school students, which he really enjoyed from his experiences with the teen group at his church, and it might help create new jobs and businesses in an area of the city where they were needed most.

In John's case, he decided to objectively compare each of the two options using a simple ranking tool. He chose these five criteria as the ones to use when making his comparison:

- The number of people he could assist – John wanted to make a significant impact on as many prospective business owners as possible.
- The depth of help he could provide – John's hope was to work in-depth with each student to increase the likelihood of the student's personal success.
- The degree to which he could control how he helped – John wanted to establish the rules of engagement that governed the amount of his time that would be spent with each student.
- The amount of personal satisfaction he would get by helping – For John, his personal satisfaction

increased dramatically when he was able to see real progress being made by those whom he helped.

- The likelihood that he could leverage his efforts to create a more lasting effect – John was interested in assisting each student over an extended period of time, since he knew that the probability of lasting success increases after a business is operating for at least three years.

When he applied his five criteria, helping at SCORE ranked higher in terms of the number of people he could assist, since there was a constant flow of local entrepreneurs who came to the SCORE office where he volunteered for a few hours each week.

However, teaching entrepreneurship to urban high school students finished first in all four of the other categories he had established as important to him.

Not only did John realize that he was more passionate about helping urban high school students, he began to get very excited about creating the new program, possibly helping with the formation of some new businesses that would increase employment and improve the quality of life for people in the area.

Instead of continuing as a volunteer at SCORE, where there were already many qualified advisors offering their help, John could redirect his business skills to this exciting endeavor. It was a new direction for his life that rekindled his passion. The next step was figuring out how to do it,

while still being able to achieve the other things outlined in John's Personal Vision, and agreed to by Lori and his family.

*For Kathy...*

In Kathy's case, this exercise did nothing more than confirm what she had been thinking all along. She wanted to be remembered as the person who put smiles on the faces of countless children, over many years, by providing them with the joy and comfort of receiving a blanket made with love.

She also identified a secondary legacy whereby she could train others to crochet, and provide some of her friends with the personal joy that came from crocheting. This was not a legacy that Kathy had originally considered, but one that emerged because of her passion for helping others.

Before moving forward, review the list of your personal gifts that you prepared previously during the Thankfulness stage, and briefly describe how you would like others to remember you.

#### DECIDE WHAT GIFT(S) YOU WANT TO SHARE

Creating your unique legacy involves combining the time, talents, and treasures you've received from others, along with your attitude of gratitude (thankfulness), and then mixing-in the special ingredients that are ONLY YOURS.

To give you a real-life example, consider my mom, who made incredible sugar cookies. All of her children, grand-

children, and other relatives absolutely loved those cookies for many years. Although mom is no longer with us, her adult grandchildren still smile when they talk about “Grammy’s cookies.”

Mom’s recipe came from her mother who had received it from someone before her. We all know the ingredients, and we also have the recipe, but the taste of mom’s cookies seems impossible to duplicate. The reason is that it depends on some things that were not written in her recipe, including how she sifted the flour, the “seasoned” cookie sheet she used, and the temperature of the milk. She had learned how to begin with the original recipe and ingredients, and to then transform them into something very special by adding her own unique twist to the process.

I’m convinced that the memories associated with those cookies are what help make them so special to us. If I took two cookies from the same tray immediately after they came out of my mom’s oven, gave one to a friend, and ate the other one myself, I don’t know if my friend would rave about the cookie like I would. With each bite, I think about all the fun we had at the gatherings where my mom served her cookies. For example, there was the day when my young son was standing on a chair helping mom make a batch when he suddenly stopped, looked up at her, and said out of the clear blue, “I love you, Grammy!”

My mom left us many memories and legacies, far beyond her legendary sugar cookies. Maybe there are some memories of your own that are coming to your mind right now.



The legacy you pass along is likely to be heavily influenced not only by the gifts you've received from others, but also by the unique experiences of your own life – your unique “legacy recipe.” Since my frame of reference and life experiences are dominated by the years that I've spent dealing with business owners, many of the examples I've observed have involved that group, and have influenced what I hope to share with others.

As you ponder what gift(s) you want to share, here are some of the factors that will influence your thought process. The amounts of each will vary dramatically from one person to another, and many will overlap:

1. The gifts you've received from others, as you already identified earlier.
2. Your Personal Vision and Values, which you also listed in a previous exercise.
3. Life experiences, both good and bad.
4. Lessons from parents, other family members, teachers, coaches, bosses, clergy, mentors, and others.
5. Knowledge received through education and training, both formal and informal.
6. Wisdom gained through your own successes and failures, and by observing the successes and failures of others.
7. Unique skill sets, preferences, and tendencies that have been with you since birth.

Think of someone whom you believe has truly reached the JOY stage by having given of their time, talents, and treasures. If you were to ask them how they figured out what ingredients they used in creating their legacy, you'll typically hear them say that it revolved around one or more of the factors listed above.

Now, set aside the time to reflect on all of the things you've learned about yourself through the previous exercises. Then, decide precisely what gift(s) you would like to share. You might find it helpful to go somewhere quiet, either alone or with your spouse/loved one, and talk about your life. Keep in mind that this exercise is not intended to focus only on what people will remember after your death, since you can be creating your legacy while you're still very much alive!

#### IDENTIFY THE RECIPIENT(S) OF YOUR GIFT(S)

The purpose of this step is to clearly define the intended recipient(s) of your legacy by answering the following question:

- If you want to be remembered for giving a specific gift, **BY WHOM DO YOU WANT TO BE REMEMBERED**, or **WHO WILL BE THE PRIMARY BENEFICIARY** of your gift?

Committing your legacy to paper is a very important step, even if the document is short, since it clarifies your inten-

tions and reduces the likelihood that they will ever be misinterpreted.

To illustrate this point, I once had the occasion to observe a Foundation that had operated for many years, long after the Founder had passed away. The organization did wonderful things for its intended audience, and had a strong following. However, after multiple changes in leadership, the focus of the Foundation had shifted very slightly to include other audiences, a transition that was not exactly consistent with the original intent. This is sometimes referred to as “mission creep.”

After a few rough years, the board changed, and a new leader was recruited to return the organization to its original focus. Fortunately, they were able to recover the ground they had lost, but only after some very painful experiences.

This sort of occurrence is not uncommon. In most cases, the people leading the charge are very dedicated, but they sometimes lose sight of one key element ---- the original intent of the Founder. A primary reason is that there are often other organizations that begin to provide the same or similar service to the target audience, and perhaps one or more of those new service-providers are doing it better, or less expensively. As a result, the focus sometimes shifts to finding more ways to generate revenue for survival rather than improving the quality of service to meet or exceed the new competition. That’s why it’s absolutely essential that you are as SPECIFIC AS POSSIBLE when deciding what you want to do, and for whom you want to do it!

While you may never intend to have a not-for-profit entity that delivers your legacy to others, there's a lot to learn from larger organizations when it comes to being very specific about what you plan to do, and for whom.

*For John....*

Using the example of John from the previous steps, here's the way he described his intended audience:

*I will create an entrepreneurship training program for high school students in the urban area of our community.*

*The entrepreneurship program will consist of twelve (12) two-hour classes over a six-month period, and will be available to those who are Sophomores, Juniors, or Seniors in high school. These classes will be held at my old business office near downtown, a few blocks from my current business.*

*The program will include instruction built around the principles of entrepreneurship that I have taught during the evenings at our local community college, coupled with mentoring for students who will be creating their own products and businesses.*

*I will provide the instruction and some of the mentoring, and will match students with other highly-qualified business mentors in the community.*

*For Kathy....*

Kathy described her recipients as follows:

*I will be crocheting blankets for children under six years of age.*

*I will deliver the blankets to Children's Hospital.*

While there are certainly other facilities where she could deliver her blankets, her passion is to help preschool-age children whose health issues are more severe, and are therefore more likely to be receiving treatment at Children's Hospital.

Before moving to the next Chapter, identify the intended recipient(s) of your gift(s).



## PHASE IV – PREPARING FOR IMPLEMENTATION



At this point in the process, you're likely to be energized. After all, you've now spent a lot of time thinking about the future, what you want to give, and with whom you would like to share it. Resist the urge to jump directly into sharing your gift(s) without properly planning for the implementation process. These next steps are very important.

## IDENTIFY POTENTIAL OBSTACLES

At first it might seem that this step should be conducted before you've moved this far down the road in the process. However, *if you start thinking about potential obstacles before you've finished formulating your dream, it can cause you to compromise what you're really passionate about achieving.*

In a moment you'll see that, in John's case, this step helped him identify that there was already another organization offering something similar to the legacy he was planning to pass along to others. But if he had known this sooner, he might have given up on the idea rather than making an adaptation that would help him mitigate the potential obstacle.

*For John....*

John discovered a few obstacles that he would have to address.

First, after John laid-out the plan to provide entrepreneurship training for urban high school students, he determined that there was one high school in the downtown area that was offering a Junior Achievement program. It was a little bit less structured than the one John was planning to offer, and did not offer the depth of instruction that John would be providing. However, in keeping with his desire to help rather than to provide competition, he met with the advisor who



was leading the Junior Achievement program to see if/how they could generate some synergy between their two efforts.

To address this first obstacle, John offered to have the Junior Achievement students attend his twelve (12) two-hour classes if they were interested. The JA leader was very pleased, so he and John agreed to stay in touch regularly so that they could continue to work together for the betterment of the students in both programs. They eventually agreed that it would provide a good opportunity to mix the students from the two groups so that they could learn to work together within teams.

John's second challenge was to find a place to hold his classes. Fortunately, he had a room with ample space at his former business office located about ten minutes from the church. He already owned the building, which offered 1,500 square feet of office space, including a large conference room, plus 3,000 square feet of heated warehouse that was mostly vacant and could easily be converted to accommodate his program.

He also had to determine what subject matter would be taught, what local business executives could serve as volunteer mentors for each of the entrepreneurial teams, and what expenses would be involved (primarily the funds needed to help student teams get their initial products or services ready to sell).

Here's how John addressed these issues:

*I will make my program available to the local Junior Achievement participants, and stay in close contact with the JA administrative team.*

*All classes will be held in the large conference room at my old office. There will also be warehouse space available where students can develop, create, and inventory their products/services.*

*I will develop the curriculum myself based upon my formal education in business, my years of experience operating my own enterprise, and the instructional materials I developed while teaching evening classes at the local community college.*

*I will recruit highly-qualified business executives to serve as voluntary mentors for each team, relying primarily on my network of business contacts at our church and through the Rotary Club.*

*I will establish a not-for-profit entity, fund it with seed money, and personally cover all expenses up to \$15,000 each year, and possibly more. If additional funds are required beyond what I'm willing to provide, I will work with students to design a fund-raising activity, and will also use my local network to attract additional financial support if necessary.*

*For Kathy....*

For Kathy, this step led her to meet with a representative of the local Children's Hospital. She learned that there were two other people who brought blankets to the hospital, but not according to any specific schedule, and never more than two or three blankets at a time. The hospital representative assured Kathy that the need for blankets was far greater than the number that were being supplied, and that the patients and their families would be extremely grateful for her generosity. Kathy was reassured that her plan had no real competition, and that there would be plenty of demand for her blankets.

She found only a few other minor challenges that needed to be addressed before she could begin giving her blankets to the hospital. First, she had to modify the way she was making the blankets so that tiny fingers and toes could not easily get caught in them. In addition, she needed approval from the appropriate party at the hospital regarding the cleanliness standards for items given to patients.

As a result of her meetings, she learned that all of her blankets would be washed by the hospital before being distributed to any of the children. She understood the hospital's position, and would make certain that the yarn she used, and the crocheting method, would be safe for the children, and would withstand the hospital's laundering process.

Kathy knew that there would be costs involved for her to produce the blankets, and she was prepared to spend up to

\$100 per month of her own money, and to devote the necessary time to make her legacy a reality.

Before going to the next step, take the time to identify any potential obstacles to your plan, and how you will address them.

#### DETERMINE SUCCESS FACTORS

Even though you're probably very excited about what you plan to do, it's wise at the outset to think objectively about how you'll measure your success. Some measures might be easily quantified, while others might not.

*For John....*

John's goal was to start new businesses where participating students could have jobs, and to hopefully continue their education at the local community college as the businesses grew during their years beyond high school. Here's how John decided to measure the success of his proposed venture:

*During year one, we will have 6 students involved, divided into two teams of 3 students who are working to form two new companies. During year two, the numbers will grow to 9 students and three companies, and by year three, there will be 12 students and four companies.*

*Not every new company will be sustainable due to students graduating and other factors. To allow for this attrition, at*

*the end of year one we will have established 1 sustainable business, and those numbers will grow to 2 at the end of year two, and 3 at the end of year three. We will reassess our expectations at the end of year three.*

*We will conduct a confidential satisfaction survey among participants at the end of each year; and will assume that we have been successful if the students rate the program 9 or above on a scale of 0 to 10.*

*We will conduct a confidential satisfaction survey among mentors at the end of each year; and will assume that we have been successful if the mentors rate the program 9 or above on a scale of 0 to 10.*

*We will consider the program successful if 80% or more of the Sophomores and Juniors return to the program for the following year.*

*For Kathy....*

In Kathy's case, she wanted to keep it very simple, since her passion was to put a smile on the face of each child who receives a blanket. In her mind, she didn't even have to see the smile herself. Her joy came from making and delivering the blankets, not from being thanked. She established the following metric for success:

*I will crochet at least two blankets, and deliver them on the last Friday of each month.*

When she shared her plan with some friends, two of them said they would like to help but didn't know how to crochet, so Kathy offered to teach them. In return, they both agreed that they would help Kathy deliver more than her goal of two blankets per month.

Kathy's legacy, which was intended for the sick children in her community, had now become a bit of a legacy for two of her friends, so she now had a specific quantitative monthly goal in addition to her heartfelt objective of putting a smile on the face of each child who receives a blanket.

Success can be measured in many ways. Before proceeding, determine precisely how you will determine if you've been successful in passing along your gift(s).

#### LIST WAYS TO PROLONG THE IMPACT OF YOUR GIFT(S)

Never assume that your legacy is going to continue without some effort on your part. Even if no firm plan is in place, it's a good idea to at least ask someone informally if they'd be willing to step in and provide some high-level guidance and direction if you aren't able to do so.

Here's how John and Kathy addressed the issue for their two legacies.

*For John....*

John was committed to leaving a lasting legacy that would stay focused on his original intent. He once again met with his family, since he needed their help and commitment before completing this step, especially since he wanted his son to handle the longer-term oversight of the effort. After discussing the details of his plan, his son agreed, and then John clarified his desires by adding the following statements to his legacy document:

*I will establish a Steering Committee to advise me, and a Board of Directors consisting of five people, three from my family, and two outsiders.*

*Included on the Board will be my wife, our son, and myself. Our son will be responsible for seeing that there is a successor in place when the time comes, and will make sure that the organization's activities are consistent with my original intent.*

*If all goes as planned, I will establish a Foundation to help fund the program for future generations. The amount and timing will be determined at the end of year three. I have spoken to our daughter, and she has agreed to serve on the Board of the Foundation if/when it is established.*

*For Kathy....*

Kathy's daughter shared her passion for helping the children, but was still busy with her job, and had no plans to retire anytime soon. After a long heart-to-heart talk, the two of them agreed that they would approach a mutual friend from their church, Marla, to see if Marla would be willing to serve as a potential successor to Kathy if necessary. Marla was one of the ladies who asked Kathy to teach her how to crochet, and she shared Kathy's passion for helping the children. Marla was flattered to be asked, and assured Kathy that she, with the help of Kathy's daughter, would do everything possible to see that Kathy's legacy would continue.

In most instances, there is no need for a partner to help you implement your plan. However, it's a necessary step to consider as you think through exactly what you want to accomplish. In John's case, if he did not already own a building where he could hold classes and provide space for students to operate their new businesses, he may have been forced to find a location that would be suitable.

Taking on a partner requires a lot of thought, and often presents issues down the road, no matter how closely aligned the partners might be. On the other hand, joining forces with others can sometimes open up a whole new world of opportunities. If John had needed a partner who could provide a facility to house his new entrepreneurship program, he might have found someone who owns real estate in multiple locations that could serve as future homes for his program if John ever decided to open other locations around his city.



Since Kathy's intention from the start was simply to feel the joy that came from helping the children, she didn't need any partners to fulfill her legacy, even though she was very grateful for the help! Marla, who had agreed to make sure that Kathy's legacy would continue if something happened to Kathy, became well-acquainted with the two ladies who were lending a hand.

Now, list ways you can prolong the impact of your gift(s), and determine if you'll need a partner to help.

#### DEVELOP A THREE-YEAR BUDGET

Budgets are normally expressed in dollars and cents, and reflect the financial requirements and expectations of a particular activity. In the case of most legacies, the primary resource to be budgeted or allocated is TIME rather than money, so it's quite possible that the legacy you've defined for yourself might not require any outlay of cash. However, it's still essential for you to estimate the amount of time you're willing to devote to sharing your gifts with others.

If your planned legacy is going to involve a financial commitment, you might need some help with this step, since many endeavors require more time, effort, and money than anticipated, no matter how well they're planned. In preparing a budget, it's sometimes helpful to think about the "rule of twos" --- be prepared for your endeavor to take twice as long as you anticipated, and to cost twice as much as you expected. This approach will often yield a more accurate assessment of what you'll be facing.

*For John....*

John had the advantage of being a business owner with access to a talented Chief Financial Officer at his company. Creating a budget for his entrepreneurship training might seem simple, since he already has a building, he'll be creating the curriculum on his own, and he plans to deliver the program himself. However, he'll also need to buy some furniture for the conference room, along with a projector. In addition, there will be printing charges for the classroom materials, soft drinks, snacks, pizza, easels, markers, and many other items. Even though John has already expressed his willingness to spend up to \$15,000 per year on his venture, it's time to take a closer look at the details.

When the students are creating their products in the warehouse area, it will have to be lighted, heated and/or cooled, and John will have to move some of the remaining items to his other locations to make space.

There will also be raw materials and supplies needed when the students are creating their products or services, so John will have to include estimates for those expenses as he prepares his budget.

John will also provide lunches and dinners for prospective students, mentors, church officials, and others in the community who are interested in what he's doing. Of course, there will be at least a minor promotional effort as well.

These are only some of the expenses that John and his company's CFO identified when arriving at his budget,

which exceeded the original amount of \$15,000 that he was willing to commit. Despite the additional expenses that were projected, John was still comfortable with making the necessary financial commitment, and understood that the numbers might go even higher after he launched.

The projected annual expenses were also broken out by month for the first 36 months so that John could anticipate the timetable for approximately when the cash would be needed.

Finally, John, his CFO, and his attorney determined an acceptable method of tracking sales generated by each company so that everything was accounted for properly.

*For Kathy....*

Kathy's calculations were fairly simple. The labor was going to be free, although there would be some entertainment expenses because her plans called for some periodic sessions at her house when she and her "helpers" would come together to crochet, talk, drink coffee, and eat snacks.

As for the cost of each blanket, Kathy knew the price of yarn, the amount of yarn required to make each blanket, and the number of blankets she intended to make each year. It was simply a matter of multiplying the numbers, and then allocating the budget to each month. The cost of the materials was well within the range that Kathy was willing to spend on helping the children.

As you develop a three-year budget, the format shown below might be of help.

Estimated Annual Expenditures

<u>Description of Budget Item</u>	<u>Estimated Annual Expenditures</u>		
	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>
_____	\$____	\$____	\$____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
TOTAL	\$____	\$____	\$____

ESTABLISH AN IMPLEMENTATION SCHEDULE

At this point, you should have enough information to determine whether or not it's feasible to begin implementing your legacy. If it's not, then go back and take a fresh look to determine if or how you can modify it in a way that you can still implement it. In many instances, it might simply mean that you need to partner with someone to get it done.

Assuming you're ready for implementation, then it's time to establish some action items and due dates. Be realistic with the due dates when you set them. That is, give yourself more time than you think you need, since there are typically a variety of unpredictable factors that can make your due dates difficult to achieve. Your name will probably appear on most, if not all, of the action items. This will place a significant constraint on the time you have available, so this is

another reason for you to be realistic with setting due dates. The simple format below may be helpful.

Action Item:	Due Date:	Person Responsible:
_____	_____	_____
_____	_____	_____
_____	_____	_____

*For John....*

John's list included meetings with attorneys and accountants to find out how to set-up and initially fund his not-for-profit. He also would need to learn: how to establish a Foundation at some point, how to set-up a Board, and how to report the financial information of a not-for-profit entity. In addition, there were action items pertaining to developing his curriculum, recruiting students and mentors, and getting the facility ready for classes.

After John completed his lengthy list of action items and due dates, he considered postponing the launch for six months, but his family and a couple of his friends from Rotary pitched-in to help with some of the items on his list, allowing him to keep his original launch date.

*For Kathy....*

For Kathy's venture, it was simply a matter of determining the few things that had to be done before she could launch her plan, like buying yarn that will withstand the detergents at the hospital, since the blankets will have to be washed before they're given to patients. She also made plans to hold her first crocheting class for the two friends who want to help.

Here's a tip when creating your list of action items. At the top of the list, make this entry: *Add my legacy to my "bucket list."* For the due date, enter this: *Now.*

You might not actually have a "bucket list" of the things you still want to do during your life, or maybe you have some ideas but have not yet committed them to paper. Either way, remember that if your legacy is truly a priority for you, then it needs to be top-of-mind when you think about your life's priorities!

Be sure you've listed the action items, due dates, and person responsible before moving to the next Chapter.

## PHASE V – MAKING IT HAPPEN



Congratulations! At this point in the process, you should be very well prepared to do what you have set out to do, so it's time to make it happen!

## DISTRIBUTE YOUR GIFT(S)

Remember this: If you have something to give away, but have not yet given it, then technically it's not yet a gift!

Be very cautious as you begin the process of transferring your legacy to the intended recipient(s). Specifically, do not take it for granted that the intended recipient actually wants what you have to offer!

I remember being in a room with a business owner and his daughter during a discussion about the future. As the business owner described with great passion how he wanted his daughter to continue the legacy that he had created in the family business, the daughter began to cry. At first, I assumed they were tears of joy, but a few minutes later she informed her father that she just didn't want to run the family business, even though she had worked there for most of her adult life as their key sales person. After some subsequent discussions, the two agreed that someone would be hired as President, while she would remain in sales, a role which she very much enjoyed.

This type of situation occurs more often than it should, simply because the intended receivers of many legacies are reluctant to express their true feelings for fear of offending the giver whose intentions are so genuine. Somehow there just isn't enough open and candid conversation about the giver's intentions, or the potential receiver's personal wants and needs, until the transfer process takes place. The same type of thing can occur when a parent wants a child to select



a specific career, but the child's interest is in pursuing something entirely different.

While I have no scientific evidence to support this, I've noticed a tendency for young people to select careers because they've observed someone demonstrate genuine passion while practicing those activities, regardless of whether or not that passionate person "makes a good living." The parents may have always expected them to pursue careers similar to their own, but instead the children choose a different path because they've observed that their parents weren't really passionate about their work, even though their jobs may have been very lucrative.

These situations emphasize one very important factor that affects the transfer of your gift to others: *Your legacy is much more likely to be transferred by your behavior than by a statement of what you intend your legacy to be.* That is, most of us become known for certain things, even if we've never formally decided what legacy we want to transfer. It just happens, and is the result of our behavior being observed by others every day...good or bad. If we become known for things that are not particularly positive, those behaviors are apt to become part of our *unintended* legacy!

If the intended recipient of your legacy does not have an interest in what you plan to give, you can either redesign your legacy to meet the desires of the audience, or find an audience that will value what you have to give.

We've been using John and Kathy as examples thus far. John's legacy has been more complicated, since it involved

establishing an entrepreneurship training program for high school students, while Kathy's was much simpler, but no less important. Kathy wanted to make a difference by crocheting blankets for patients at her local Children's Hospital.

The majority of legacies are simple, like Kathy's, and much easier to transfer, but they require the same thought process if they're going to deliver the lasting impact desired by the giver. Consider the London bus driver who serenades his passengers with his incredible vocal talent to make each trip both enjoyable and memorable. He has figured out a way to combine his livelihood with his passion for singing, all for the benefit of the people he meets each day.

The point is this --- whatever your legacy, don't wait to start sharing it. Sure, it might take you a while to get organized if you want to do something like John is planning to do by launching an entrepreneurship program for high school students. However, in the meantime, John can also be helping students one-on-one while he develops his grander plan. Similarly, Kathy can begin crocheting blankets immediately, even if she's not yet able to set aside the time she'll need to meet her monthly goal of blanket production.

If you have a fairly clear idea of what you want to share with others, but are struggling with how to get started, remember what was said earlier and deserves repeating – the transfer of your legacy is inhibited when you don't have enough control over your life to move forward. Therefore, do what's necessary to get and maintain that control, not just because it

simplifies the transfer of your legacy to others, but because it makes life easier and more fulfilling overall.

If the idea of being in control of your life sounds selfish to you, it might be! Here's a simple way to find out. If the primary reason why you're trying to regain control of your life is *to make things better for yourself*, then there's probably some selfishness involved. However, if you're trying to regain control of your life so that you can *improve the lives of others*, then you're not only being unselfish, but you're also on the road to transferring your legacy!

A really eye-opening exercise is to roughly track the way you currently spend your waking hours. It's a matter of first listing each activity - for example, getting ready for work, traveling to and from your job, working, driving children to school, attending class, cooking, eating, attending children's events, shopping, watching TV, exercising, hobbies, leisure activities, reading, emails, talking on the phone/texting, etc. Then, each day for at least one full week, record the amount of time you spend on each activity. It's generally accurate enough to use increments no smaller than 15 to 30 minutes. If your daily activities are less routine and predictable, you may want to track them for a few weeks. Here's a format that might be helpful.



If those things still have to be done, can you find someone else to do them? If you could make the necessary changes in the way you spend your time, specifically how would this enable you to devote more of your life to transferring your legacy?

The results of this exercise might surprise you, and compel you to take more control over your life, even if you still can't find time to pursue your legacy. If you translate the daily numbers into your life expectancy, it can be alarming how many years of your life are being spent doing certain things. No matter how you view it, this should give you a reason to remove some obstacles and take greater control of your life.

Below is your call to action.

- In bullet-point form, write yourself an email or letter that outlines exactly how you will begin to transfer your legacy, and by when. It may very well require you to make needed changes in your life or remove obstacles. Your plan can be as simple as modifying the way you interact with your family, volunteering your services somewhere after work, or it might be a matter of helping coworkers in some new way. If you own a business, there may be a few unique ways to help employees without ever having to look outside your business, like hiring those who are genuinely trying to turn their lives around after having made bad choices previously, or providing a daycare service for your employees.

- When you've completed your message to yourself, print it, and post it in a place where you'll see it regularly, but not in a location where others can read it. Since your bullet-point action plan will have at least approximate due-dates on it, enter those dates on your calendar to keep you on track. Introducing some discipline in the process will keep you focused, and increase the likelihood that you'll successfully transfer your legacy to the intended audience. Remember, the things that get measured are the things that get done.
- Finally, if you *really* want to stay on task, share the list of action items and due dates with your spouse/significant other, friend, mentor, or coach. Then, ask them to hold you accountable.....it probably won't surprise you that this is a *very* effective way to achieve results!

MONITOR SUCCESS OF IMPLEMENTATION, AND  
EXPERIENCE THE JOY OF HAVING SHARED  
YOUR GIFTS

If you've ever spent a lot of time choosing the perfect birthday gift for someone, you were probably very interested to see their reaction when the gift was opened. Or, if you meticulously prepared to hit a golf shot that was intended to land in a specific spot, it would be disappointing if you were unable to see where the ball ultimately ended up.

Similarly, the level of joy you receive from sharing your legacy with others will be heavily dependent upon what impact it has had on the intended recipient(s). That's why it's so important to monitor what happens when you share your legacy.

Here's a great quote to introduce the topic of joy:

*“Only the development of compassion and understanding for others can bring us the tranquility and happiness we seek.”*

— DALAI LAMA, XIV

If you've distributed your gift(s) to others with the intent of receiving something in return, then you've missed the whole point of a legacy, and you probably won't feel very much satisfaction for having shared it.

There are certainly many definitions for the word “joy.” As it relates to sharing your gifts with others, joy is the unintended feeling of deeply-rooted tranquility and satisfaction that you receive after transferring your legacy to others *simply and genuinely because you have compassion and understanding for others, and want to make life better for them and those around them...period!*

The feeling of joy is certainly strengthened by the thankfulness that comes back to us from those who have received our gifts, just as our own thankfulness has helped bring joy to those who have shared their gifts with us. However,

receiving thankfulness is not the only driver of joy, since other physiological and psychological factors are also contributors to the peacefulness and satisfaction we feel after the transfer of our gifts to others.

Most people are “givers” because they genuinely want to help others, not because they want anything in return. Yet there are definitely some unexpected rewards for expressing kindness. There are many studies that confirm the health benefits that givers receive by having given to others. If you take the time to do an internet search, you’ll find that some of the statistics are quite amazing, and they provide strong scientific evidence that givers receive not only joy, but also have better health.

There’s one particularly compelling article that provides a scientific explanation for the feeling of joy that comes back to those who transfer their gifts. Dr. Eva Ritvo, MD, is a psychiatrist and internationally-known author. On April 24, 2014, she posted an article on the website, [www.psychologytoday.com](http://www.psychologytoday.com), entitled, “The Neuroscience of Giving,” where she explains how the act of giving triggers the *Happiness Trifecta* of dopamine, serotonin, and oxytocin. Here are a few paragraphs taken directly from that article:

*“Humans are social animals, so it is no surprise that we are wired to help one another. In our complex modern society, there are many ways to give, and the good news is that we now understand that both the giver and receiver benefit from the relationship. Neuroscience has demonstrated that giving*



*is a powerful pathway for creating more personal joy and improving overall health.”*

*“While the brain is remarkably complex, the neurochemical drivers of happiness are quite easy to identify. Dopamine, serotonin, and oxytocin make up the Happiness Trifecta. Any activity that increases the production of these neurochemicals will cause a boost in mood. It’s really that simple.”*

*“So, if giving allows us to secrete all three chemicals at once, we owe it to ourselves to give as often as possible!”*

*“Helping others can take on many forms. Small repeated boosts of the Happiness Trifecta will produce the most benefit, so find ways to give, and to give often. Opening a door, helping a stranger change a tire, donating money or time, and giving advice are all wonderful ways to give. Anytime we step outside of ourselves long enough to help someone else, something wonderful is waiting in return; the Happiness Trifecta neurochemicals are all boosted!”*

Not only do we get the feeling of joy by giving to others, but we can actually get a similar feeling by just watching someone else be overcome with tranquility after sharing a gift with someone which, in turn, compels us to share our own gifts with others.

A friend of mine once told me about a woman who founded a not-for-profit organization because of her genuine, deeply-rooted passion for helping teenagers who had been in trouble. Her goal was to give them a fresh start in life after most of society had given up on them. The organization was

designed to teach the students a trade, after which the founder helped them find permanent employment in the community.

One day, my friend observed the founder as she looked out of her office window, watching her students catch the bus at the end of the day. She had tears of joy in her eyes, knowing that many of her students were truly going to have a better life. By simply watching someone else feel the joy that comes from helping her students, my friend was overcome with a similar feeling that compelled her to help others in her life.

One of the wonderful things about joy is that you can get little tastes of it throughout your life, typically by performing random acts of kindness like the ones described by Dr. Ritvo. I can remember getting those positive feelings at a very young age after sharing a toy with a friend, or giving Christmas gifts to my parents or sisters with the money that I had earned from a part-time job.

As I matured, I found that an act of kindness toward another could often cure me of feeling sorry for myself after some seemingly important setback in my life. Or, when a friend was feeling “down,” and was looking to me for advice, the best solution was usually to recommend that my friend do something nice for another person who was in need of help. It was great medicine then, and it still is today!

When you get really good at this, and your intentions are pure, you actually get the feeling of joy even before you’ve distributed your gift(s) to others, or performed a simple act

of kindness for someone. It's the mere thought of what you're about to do that triggers the tranquil feeling, and brings us back to Shakespeare's quote that we used at the outset of this book:

*“The meaning of life is to find your gift. The purpose of life is to give it away.”*

If you're still not sure how you can share your unique gifts with others, the final Chapter of this book will provide you with some options that might be helpful. Before we consider those options, let's see what happened to John and Kathy.



THE REST OF THE STORY: JOHN  
AND KATHY, FIVE YEARS LATER



Five years after John and Kathy decided what they wanted their legacies to be, both had managed to keep their plans relatively on track --- John with the creation of his entrepreneurship training program for high school-age students, and Kathy with her dream of crocheting and delivering at least two crocheted blankets to hospitalized children.

Here's an update on how things actually unfolded for both of them.

John and his wife, Lori, were both able to retire two years ago, pretty much according to the schedule they had established during their Personal Vision discussions, although there were some slight modifications in timing that required minor revisions in the document when they conducted their annual review.

John hired an outside President six months before he retired. The new President first served as a consultant to the company for a period of nine months, which gave John a chance to see him in action. One of the most important criteria in making the selection was that the new President serve as a great mentor for John and Lori's son, helping to prepare him for taking on the role as President in a few more years.

Lori and John received a pleasant surprise recently when their daughter in Austin announced that she and her husband would be expecting another child in six months. John and Lori were pleased that they had already purchased a condo near their daughter three years ago. They immediately made plans to spend more time at their condo in Austin during the coming months, especially after the new baby arrives, enabling them to provide more help watching their other grandchildren during those first few weeks after the baby comes home.

The timing actually worked out very well for everyone, since John and Lori's home in Pennsylvania was about to be

renovated, and they really didn't want to be living there during all the construction. They had originally planned to renovate their Pennsylvania residence a year earlier, but their son and his new wife moved in with them temporarily while the construction of their new house was being completed.

John and Lori arrived at their condo in Austin, and began to spend more and more time with their grandchildren. They occasionally ran into Dee, the high-school girl who lived next door to their daughter, and who was a frequent babysitter for their grandchildren. The grandchildren loved Dee, who had become like a family member to everyone.

One afternoon, during an over-lapping shift in baby-sitting duties, Dee and John found themselves talking about Dee's plans after high school. She was an aspiring entrepreneur, very creative and artistic, and hoped to attend school during the evenings to become an interior decorator while working full-time at the arts and crafts supply store where she was employed part-time during high school.

John immediately recognized the excitement in Dee's eyes as she told him about her dreams. It was rare to see someone her age who had such a clear vision, and relentless passion, about what she wanted to do with her life.

After Dee left, John and Lori agreed that they wanted to help in some way. John already had all of the materials and lesson plans that were being used at his entrepreneurship training program in Pennsylvania, and he knew that he and Lori would be spending more and more time in Austin, not just in the coming months, but periodically beyond that. So, John

and Lori decided that John would offer to help mentor Dee so that she could gradually begin to launch her own decorating business.

The following week, they both met with Dee to tell her that John would like to lend a hand. Dee was absolutely ecstatic to hear the news as she looked forward to her upcoming graduation. She insisted that John and Lori attend her graduation party, which was to take place in just a few weeks, since Dee genuinely wanted everyone in her family to meet John and Lori.

Meanwhile, more than a thousand miles away, Kathy was busy crocheting baby blankets, just as she had planned. Her daughter still worked at the post office, and was now married to a gentleman she met at work. They lived only ten minutes from Kathy.

While Kathy's original intent was to deliver an average of two blankets per month to children at the hospital, two of her friends from church had joined her after Kathy had taught each of them how to crochet. Between the three of them, they were now delivering an average of three blankets each month.

Some of the hospital's staff members started to refer to the three ladies as "Kathy's Angels." While Kathy and her friends certainly appreciated being referred to by such an affectionate name, their greatest personal satisfaction came from the joy they were bringing to the sick children and their families.



Meanwhile, back in Austin, John and Lori had been called to the hospital due to the news that their daughter was in labor. In a matter of a few short hours, they had a new grandson named Trevor.

Before they had a chance to celebrate, they were told that there was a complication with the baby's breathing that would require that he be confined to the intensive care unit. Trevor's parents spent every day at the hospital for a full week. John and Lori were able to join them for a couple of hours each evening after Dee relieved them from their babysitting duties at the house.

On one of the days when John and Lori's babysitting time overlapped with Dee's, the three of them began to talk about Dee's upcoming graduation, which was only a few days away. Dee was still very thrilled that John would be mentoring her soon after she graduated, and the time was growing closer.

During their visit, Dee handed John and Lori a blue box bearing a large ribbon. She explained that she wanted "Baby Trevor" to have a special gift, and asked if John and Lori would deliver it to their daughter and her husband when they visited the hospital later that evening.

As John and Lori left for the hospital, they hugged the grandchildren and Dee, thanking Dee again for her thoughtfulness, and telling her they planned to see her at her graduation ceremony and party in a few days.

When John and Lori arrived at the hospital, they then presented Dee's gift, and watched curiously as their daughter and son-in-law opened it. Inside was a beautiful blue blanket that Dee had crocheted for Baby Trevor. They were all deeply moved by Dee's generosity and compassion, and felt very fortunate that she had been brought into their lives.

The next day, Trevor was released from the hospital, and things began to get back to normal for the entire family. A few days later, a neighbor and registered nurse agreed to watch Trevor so that the entire family could attend Dee's graduation and the reception at her parents' home afterwards.

At the graduation party, John and Lori met many of Dee's relatives. Dee was very excited to tell everyone about John becoming her mentor as she prepared to plan and launch her own decorating business.

As Dee led John and Lori around the yard, making introduction after introduction, they were eventually introduced to one of Dee's aunts, whom Dee affectionately referred to as Aunt Kiki. Dee and Kiki had become very close over the years, since Kiki babysat for Dee before she was old enough to attend school.

John told Kiki what a wonderful young lady Dee had become, and that he was truly pleased that he would be able to help mentor her in the launch of her new business. At that point, Lori told Kiki that Dee had recently crocheted a blanket for their brand-new grandson, Trevor, during his extended stay at the hospital.

After telling the story about baby Trevor's blanket, John and Lori noticed tears in Aunt Kiki's eyes. She was so moved that she was unable to speak. Instead, she simply wrapped both of her arms around Dee, and the two of them sobbed together as John and Lori looked on without a clue as to what had just happened.

They then learned the rest of the story. During the time that Aunt Kiki and Dee were together many years earlier, Kiki (whose real name was Kathy) taught Dee how to crochet. The objective was always the same --- to provide a blanket for a sick child and bring joy to that child and his or her family.

Dee then related one very memorable visit to the hospital when she was first able to hand one of the blankets to a two-year-old girl and her family as they were visiting with one another in the hospital. It made such an impression on Dee that she was ecstatic when she had the opportunity to crochet a blanket for Baby Trevor.

We never know how our legacies will ultimately affect others, or how the seemingly unrelated legacies of two people like John and Kathy (known to her niece as Kiki) can intersect to spawn a new legacy in someone else. John and Kathy gave of their individual time, talents, and treasures, never knowing that they would converge and be transformed by Dee, who will now have the opportunity to pay it forward.



FINAL THOUGHTS, AND OTHER  
RESOURCES



In Chapter One, the four-fold purpose of this book was described as follows:

- To raise your level of awareness regarding legacies.
- To provide you with a blueprint for defining and transferring your unique legacy to others.

- To encourage you to take action so that your legacy becomes what you intended it to be.
- To help you feel the deeply-rooted joy that comes from achieving *your next checkered flag...the transition from “making a living” to “making a difference.”*

Your success will be greatly enhanced by setting up the necessary controls, benchmarks, and discipline to make sure that you meet the specific timetables and outcomes you’ve established for successfully transferring your legacy. The accountability for getting this done is largely self-imposed, but may require the objective eye and prodding from an outsider to make sure the transfer of the legacy goes as planned.

If you’re still not exactly sure what gift you want to pass on to others, take another look at how you currently spend your free time. It’s usually a great indicator of the activities that float your boat, and will likely hold some clues as to how you can make a difference in the world, even if only one person at a time.

Of course, the internet is filled with organizations that are looking for volunteers. In fact, there are websites that are devoted specifically to matching volunteers with organizations that are looking for help worldwide. In general, it’s simply a matter of letting them know where you want to volunteer geographically, and what type of organization you would like to help (for example, one that is focused on helping children, animals, the environment, etc.). There are

typically many general categories to choose from, depending on which website you visit.

Once you specify your criteria, the website will identify the volunteering opportunities that meet your specifications so that you can review and evaluate each potential match in detail.

Here are just three of the many websites that are often used for creating a match, along with basic information that has been extracted directly from those websites and summarized for your review:

- [www.volunteermatch.org](http://www.volunteermatch.org) - Volunteer Match aims to strengthen communities by connecting volunteers to good causes worldwide. They match “inspired people with inspired causes” to achieve remarkable outcomes, making it quick, easy, and effective.
- [www.idealst.org](http://www.idealst.org) – Idealist connects people who want to make a difference with opportunities for action and collaboration worldwide. They help people move from intention to action, all over the world.
- [www.pointsoflight.org](http://www.pointsoflight.org) – Points of Light was founded in 1990 by President George H. W. Bush as an independent, non-partisan, non-profit organization to encourage and empower the spirit of service worldwide. Hands-On Network, which is part of Points of Light, brings people together to strengthen communities through meaningful

volunteer action and projects, inside and outside of the U.S.

If you're interested in sharing your talents to help create and nurture new businesses, there are many opportunities to do so. Listed below are a few of the more popular organizations that may interest you:

- [www.taprootfoundation.org](http://www.taprootfoundation.org) – The Tap Root Foundation is a nonprofit that engages design, marketing, IT, strategic management, and HR professionals in pro bono projects to help other nonprofit organizations that need those types of skills, but could not otherwise afford them.
- [www.iesc.org](http://www.iesc.org) – The Internet Executive Service Corps is a nonprofit organization dedicated to equitable, sustainable economic growth in developing countries. They help build strong business enterprises, create new jobs, develop skilled employees, and improve the quality of life in communities.
- [www.fsvc.org](http://www.fsvc.org) – The Financial Services Volunteer Corps is a nonprofit that advances economic development by structuring financial sectors in underdeveloped countries using unpaid financial executives. Among other things, they help expand access to money, combat terrorist financing, strengthen financial regulations, promote new capital markets, expand commercial banking, and strengthen public financial management.



- [www.score.org](http://www.score.org) – The Service Corps of Retired Executives (SCORE) is a resource partner of The U.S. Small Business Administration, and the nation’s largest network of volunteers and expert business mentors. SCORE has more than 10,000 volunteers in 300 chapters around the country, and has offered mentoring and educational workshops since 1964.

If you’re a retired teacher, or have a special talent that you’d like to share with students, don’t hesitate to volunteer as a tutor. To help someone with English, Reading, Math, Science, or some other subject area, just contact the administrative office at a school where you would like to lend a hand and tell them you want to volunteer.

For physicians, nurses, dentists, and other medical professionals who have retired, and would still like to make a difference in the lives of others, you might find the following organization to be of interest:

- [www.volunteersinmedicine.org](http://www.volunteersinmedicine.org) – Volunteers in Medicine is a national network of free clinics using retired medical and community volunteers.

Many of the websites above will allow you to sort through the opportunities using a variety of criteria, including your area of interest, geographic region, number of miles from where you live, and other factors. Also keep in mind that there are plenty of opportunities to get involved at nearby

churches, civic organizations, museums, parks, libraries, senior citizen centers, animal shelters, and other places in your local community.

Once you've identified a few that could be good matches for you, call or visit each one so that you can learn as much as you can, and to confirm that the organization is a good match with your personal values and goals. Like every other aspect of your life, the more information you have, the more likely you are to make a good decision.

Talk to the other volunteers, and don't be afraid to ask if you can be a trial volunteer for a while to see if you feel like it's an opportunity that's right for you. If they push back, move on to the next organization on your list.

When you find one that seems to be a fit for you, it's simply a matter of giving it a try, and allowing yourself enough time "on the job" so that you can make a good judgment as to whether or not this is the right way for you to share your gifts.

If it takes a while, don't get discouraged. Remember that each new experience will give you more clarity on exactly what you want your unique legacy to be, and get you closer to your next checkered flag...the ultimate JOY ride!

## ABOUT THE AUTHOR



After serving as an Executive and Officer for a “Fortune 500” company, and President of a financial services business, Bill helped create Aileron, a not-for-profit organization in Dayton, Ohio. Since its founding in 1996, Aileron has provided educational and advisory services to thousands of privately-held businesses. He has also authored two other

books, *Don't Step in the Entremanure*, and *Five P's to a "WOW!" Business*, both published by Sound Wisdom.

Spanning three decades, Bill has worked closely with hundreds of business leaders and their teams to implement professional management systems, strategic planning, boards of advisors, and performance-based cultures. He is co-founder of The WOW Business Advisory, LLC, and creator of Drive My Biz to WOW, a “free-on-demand” service to help privately-held businesses who need guidance.

Through global licensing arrangements, his “best practices” are now being delivered by Sandler Systems, the world’s largest sales and management training company.