

Legacy Letter Guide

FOR DONORS & FAMILIES

A Legacy Letter can communicate the “why” behind your estate plan: why do you get up every day, and why do you value the things that you do? We encourage clients to write letters to their kids, heirs, or others who are meaningful to them. They can be shared immediately or kept with an estate plan. Here are a few questions to get you started thinking about your own “Legacy Letters”:

Legacy Letter Questions

- What do you want your legacy to be?
- What is your life’s passion OR how would you describe your life’s work?
- What have been your most treasured memories? (Or, perhaps your most treasured memories of the person you’re writing to...)
- Are there any specific events, experiences, or people that have shaped you?
- How do you hope you’ve impacted others in your life OR how do you hope you’re remembered?
- If you'd been involved in a specific charitable cause, or worship in a certain way or place, is that something that you hope they carry on after you're gone?
- What is your hope for your family’s/loved one’s future?
- If you are a parent, what has been your favorite part of that role? What has your child taught you, or are there attributes that you'd like to affirm or encourage in them?
- If you are married, what is your marriage based on? What brought the two of you together, and what are the values that form the foundation of your home/family?
- Do you have any significant places/verses/sayings that are important to your family, that you'd want to weave in?
- Do you have any significant memories/stories that you'd like to share?
- What’s an important life lesson, or words of wisdom, that you’d like to pass on?
- What achievement(s) are you most proud of?
- Are there any meaningful possessions/assets included in your estate plan that you want to be sure to explain or call out? What should the recipient(s) know about them?
- How do you hope your kids/heirs’ inheritance impacts their lives OR how do you hope they use it?
- What’s your cheesiest joke? Favorite movie line or song lyric? Favorite saying you’ve been known to interject? (This can be fun, too!)

Another option is to record your Legacy Letter in an audio file or in video. Find out more at giftplanningservices.com/storytelling