

SPECIAL REPORT

“What is Your Legacy?”

Thoughts on Preserving Your Values and Life Experience for Others

by Mary G. Anderson, *Family Legacy Planning Institute*



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Organizational Consultant/Coach, Author & Speaker

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What if I told you I had a secret that would help you to live a longer, richer and more fulfilled life? I do. The secret is creating your own Legacy Will now. What is a Legacy Will? A Legacy Will is a document that is created by you in addition to your Last Will & Testament. It is not a legally binding document. It is a letter or note that is designed by you to be given to your loved ones. The legacy will allows you to easily transmit your values, life lessons, family history and other experiences to those left behind when you pass away.

The process is as simple as writing a love letter to the people closest to you—from your family to your friends, colleagues, teachers, mentors and heroes. In a recent issue of AARP magazine, there was an article discussing the growing power and numbers of the aging baby boom generation. This group of Americans has experienced more wealth and prosperity than their parent’s could have ever dreamt would be available. This group of people (between the ages of 40-60 years old) is both challenged by being in the peak of their careers, in the process of raising their own families and often caring for their parents and grandparents unique elder care needs as well. It’s an important time to look at your personal legacy as well as a financial plan for your surviving loved ones.

My interest in creating a Legacy Will came out of my own startling experience during the summer of 2002. A little history first: I grew up in Los Altos when it was mainly an enormous apricot orchard, in the late 50’s, and I spent my childhood summers cutting apricots to dry on huge pieces of plywood. Believe it or not, Foothill Expressway was a railroad track and my Dad walked up El Monte Avenue every morning to take the train to Palo Alto to work at Lockheed! So enough reminiscing about me but I have stories that are so rich and full of fun that I love to share them. These stories are part of my Legacy Will. My entire family grew up, studied, married and raised their families within a mile of my parent’s home in Los Altos. During the summer of 2002, I was sadly met with the unexpected death of three family members including my parent’s and my brother. In addition, my 21-year-old son, Taylor, spent one month in El Camino Hospital at death’s door with complications from a burst appendix. He survived but I was suddenly in a position of being executor and trustee of both of my parent’s estate and my brother’s estate and law practice.

I quickly learned about the grief and shock that the death of a loved one imparts on the remaining family members. Not only are you overwhelmed with sadness, in addition, there many financial, legal, personal and medical decisions and processes that must occur immediately following a death. Locating important papers, planning a funeral program, mortuary arrangements, reception plans and more must be organized. The way I have described it to others it is like planning a wedding for 500 with about two days notice and you’re depressed on top of it! Challenging at best!

It was after this difficult summer that I became interested in expanding my consulting business to include services to support, inspire and encourage others to evaluate and describe the more meaningful moments in their lives. By creating a Legacy Will and ultimately passing on your values, experiences, memories, joys and hardships to others you create a link between the past, present and future. From a simple note to a more complex genealogy or DVD describing your thoughts and feelings about your life ‘so far’, creating a Legacy Will has been proven to be a healing experience for both yourself and the loved ones who will read and cherish it one day.

Interestingly enough when clients begin to plan arrangements for their own end- of- life care and passing; they often end up making new plans for their current life! If you are looking at this being the last third or maybe fourth quarter of your life—what do you want to do? What is left to complete? What’s been important and why? How do you want to be remembered? Completing a Legacy Will helps people have a greater understanding of themselves, their family origins, and their lives. It also encourages people to examine their dreams and accomplishments to date. Even children can write a Legacy Will to their parents, siblings, and friends, whomever they wish to share gratitude with and connect at a deep level.

If you are interested in learning more about creating your own Legacy Will or learning skills to interview relatives that have so much to share about their own personal history, please call Mary at 650/960-3772.

Questions? Comments? Please contact us by telephone or e-mail [here](#).

“The universe is not going to see anyone else like you in the whole history of creation. It is up to you to become a letter, a word, a page in the book of human history...” ~Vartan Gregorian

About the Author...

Mary G. Anderson, Family Legacy Planning Institute

- Organizational Consultant/Coach, Speaker and Writer
- Certified Conflict Resolution Specialist/Mediator
- Hewlett Packard, Management Training Specialist
- Founder, Advanced Legal Training Institute & Family Legacy Planning Institute
- Producer and host of “Voice of the Valley” television show
- BA Willamette University, Secondary Teaching Credential

Family Legacy Planning Institute (Client Services & Estate Settlement Advisor)

Founder of the *Family Legacy Planning Institute*, Mary Gutheil Anderson, is an organizational consultant/coach, speaker, seminar leader and TV producer. Mary specializes in supporting clients through difficult life transitions. She offers strategies, solutions and systems to assist clients through the challenging process of dealing with unexpected and unwanted change. As a personal and business coach, Mary works with clients who are going through transitions such as grief over the passing of a loved one, life threatening illness, loss of job, relocation, divorce, feelings of overwhelm and chronic disorganization.

In the past few years, Mary has met with a series of unexpected deaths, which included four family members, including her 22- year old son, Taylor. She was forced to confront many challenging obstacles including planning funerals, settling four complicated trusts and making other difficult end-of-life choices. It was at this time that Mary also became actively involved as executor of both her parent's estate and brother's estate. She quickly learned about the grief, shock, inertia and indecision that often face executors/trustees as they try to quickly organize and access all the paperwork, deeds and property etc. that may be required by CPA's, attorneys, insurance/real estate agents or other advisors. The Family Legacy Planning Institute was created to help other individuals and families who were working through similar challenges (facing some of the same issues she had). She works in conjunction with the professional services offered by the Estate & Trusts Attorney.

Mary provides a consulting service to assist clients who are either in 1) the midst of handling a death of a loved one, executing and settling their estate and/or 2) a client who has decided to get organized and plan ahead by completing an end-of-life plan including their will, collecting their important papers and completing a checklist of final wishes. She also offers Legacy & Succession Planning services for business owners and executives as they develop their vision and successors for generations to come.

*Member of the International Coach Federation (ICF)
Certified Professional Coach, Charter Member of Coachville (COACH U)
Graduate, Excellence Coaching &, Accomplishment Coaching
Graduate, Life on Purpose Institute, Coaching from Spirit & Explode Your Business Income
Golden Circle Member of National Association of Professional Organizers (NAPO)
Member, International Enneagram Association (IEA)*

Member, National Speaker's Association (NSA) & Member, American Society of Training & Development (ASTD)

A Note from Mary

Are you a going through a challenging period of time facing some difficult changes, health issues or sudden grief over an unexpected loss? Are you an individual seeking unbiased support and a path to manage change in your personal and/or business life? You might consider hiring a coach. Coaching is a positive, powerful investment in you, your growth and is often tax-deductible as a business expense. Contact me to set-up a complimentary 30-minute coaching call. In our time together, we'll explore the issues bringing you to coaching and determine if I'm the right coach for you!

“Most of us miss out on life's big prizes. The Pulitzer. The Nobel. Oscars. Tonys. Emmys. But we're all eligible for life's small pleasures. A pat on the back. A kiss behind the ear. A four-pound bass. A full moon. An empty parking space. A crackling fire. A great meal. A glorious sunset. Hot soup. Cold beer.” ~Anonymous

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