

October 31, 2019

Mr. Sam Sample
123 Main Street
Anytown TX 76110-5626

Dear Mr. Sample:

Thank you for attending our *Picture Your Legacy* event on October 7. I hope that you enjoyed the activity with the photo cards and that you have had some time in the days since to prayerfully reflect on the way the Spirit was guiding you that morning.

You may want to reflect on these questions:

1. Did you have an “Aha!” moment during, or as a result of, the event?
2. Who else (spouse, family, advisors, etc.) needs to hear about what you learned? Is there an opportunity for these conversations to take place during upcoming family holiday gatherings?
3. How have your past gifts aligned with your values? What changes might you want to make as a result of this event?
4. What more would you like to learn?
5. What can [NAME OF ORGANIZATION] do to help you take the next step?

I look forward to assisting you in *Building Your Legacy* and invite you to contact me at [PHONE NUMBER, EMAIL] at any time. With prayers for a Happy Thanksgiving and a blessed Advent season ahead, I am,

Sincerely yours in Christ,

Name
Title

Sample Script for a “Picture Your Legacy Presentation”

At [NAME OF ORGANIZATION], philanthropy and legacy, and discussions about them, are very important to us. But how to start the conversation? Today, we would like to model for you and have you participate in an engaging activity that we can bring to your school or to your parish to assist you in opening up those conversations with potential planned gift donors.

At this time, we are distributing to each of you a box. Please don't open it until instructed to do so.

Over the last twenty-five years a small canon of research on family storytelling tells us that children who know their family's past and their family's stories are much more resilient. They have higher self-esteem and stronger self-concepts. They have more robust identities, better coping skills, and lower rates of depression and anxiety. And families that leave in the funny bits, the sad bits, the gory and smelly bits – your children and grandchildren will tell these stories for generations to come, and come to know and share your values.

So we billed this event as “Picture Your Legacy.”

When I say the word “legacy” what is your reaction? When you think about “your legacy” what does that mean? Anyone?

(allow time for responses)

These are all good responses. I also think it's interesting that no one mentioned money, but we all have to admit that having our legacy fulfilled after we are gone will require some resources – of our time and our money.

Now I'd like to guide you through an exercise that helps individuals, groups, and families toward articulating a legacy—be it in business, philanthropy, or life.

Please open the box. *Picture Your Legacy* is a deck of 52 colorful image cards. Images can help to stimulate this process by tapping into the right side of your brain and revealing how you aspire to be in the world.

We recognize that it's difficult to start with a blank sheet of paper and write down a vision for your legacy from scratch. So I invite you to take about three minutes, by yourself, without any discussion, sorting through the images. Choose the images that instinctively speak to you and represent how you aspire to fund, operate, invest or to be in the world.

Please don't get caught up in the facts of each photo. For example, there's one photo of two sailboats. It doesn't have to literally mean that you want to invest in a sailboat. It could metaphorically mean that you want to enjoy more vacations, a relaxing retirement, or you want to have the freedom to chart your own course in your decision making.

In the next couple of minutes, narrow down to 5 or so cards.
Then three. And only three.

(time for narrowing down)

Everyone finished? Now, please pair up with someone that does not live in your same household, preferably with someone you do not know very well. For the next 5 minutes, each of you take time to share with the other:

1. What do I see on the card, literally?
2. What does it evoke or bring to mind?
3. What does it say about how I aspire to be in the world?

Please set aside the cards you weeded out so that you are not influenced by another person's comments.

(time for first person to share)

(time for second person to share)

So how was that?

(responses)

As hard as it was to verbalize this with another person, might it be even harder to share with a family member?

So where do you go from here? I'd like to encourage you to jot down some of the words you used in describing your images to

your partner to formulate language for a personal mission or vision statement.

Then, I invite you to download the app *Picture Your Legacy* from The App Store or Google Play. This allows members of your family, even geographically far apart, to complete the app version and email their top three choices with notes to one person in the family, or a financial advisor for follow up discussions.

INSERT YOUR CUSTOM CLOSE HERE (Example: In the Advancement Foundation we have a Legacy Society. These are the people who have let us know that they have made provisions for their parish, Catholic school, the Diocese of Fort Worth or another ministry in their will, or through designations in life insurance or retirement plans, gift annuities, trusts or endowments. We work closely with you and your legal and financial advisors to allow you to provide first for your family and then for your favorite Catholic ministries. If this is something you are interested in considering, you will find more details in the booklets that we have placed at each table.)

I encourage you to have conversations with your family and your financial advisors about the insights you gained today. As you move forward and need additional information about including the Catholic Church in your plans, please reach out to [NAME OF ORGANIZATION] at any time. Our contact

information is also in the booklet. Thank you for your kind attention.

For more information about the “Picture Your Legacy Planned Giving Presentation,” please contact:

Renée Underwood, CFRE

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Diocese of Fort Worth

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A Guide for Next Steps

Continue the conversation with *Picture Your Legacy*.



This set of image cards created by 21/64 can guide individuals, groups, and families toward articulating a legacy—be it in business, philanthropy, or life. We recognize that it's difficult to start with a blank sheet of paper and write down a vision for your legacy from scratch. Images can help to stimulate this process by tapping into the right side of your brain and revealing how you aspire to be in the world.

1. Share these images and communicate what they mean with your loved ones, the important people in your lives:
 - Write a personal vision statement, a message to family members, partners and grantees, about what is important to you. Use the images and descriptive language used today to describe them as a starting point.
 - Download the free iPhone App from 21/64 *Picture Your Legacy*. Here you can save your top cards as images on your smartphone and from the app, email the images to important people in your life to keep the conversation going.
2. Invite others to this conversation and hear what they want to achieve in their lives.
 - Bring these cards home with you and using the instruction card inside the box, do the exercise with others.
 - Invite those who are more geographically distant to use the iPhone App and share with you the images that inspire them and then have a conversation about how those images speak to the legacy they want to leave.
3. Allow these meaningful images to continue to inspire you in the following ways:
 - Capture your top cards in a photo, or perhaps even a selfie, to recall and reflect on the experience here today.
 - Bring these cards home with you, place them in a picture frame, tape them to a mirror, or even tucked them into the visor of your car so they can continue to remind you of the legacy you can create each day.