



Your Life. Your Legacy.

BILL MARSELLA / CATHOLIC COMMUNITY FOUNDATION OF MINNESOTA

Practical Exercise

Reflect and jot some notes on how you might answer these questions...

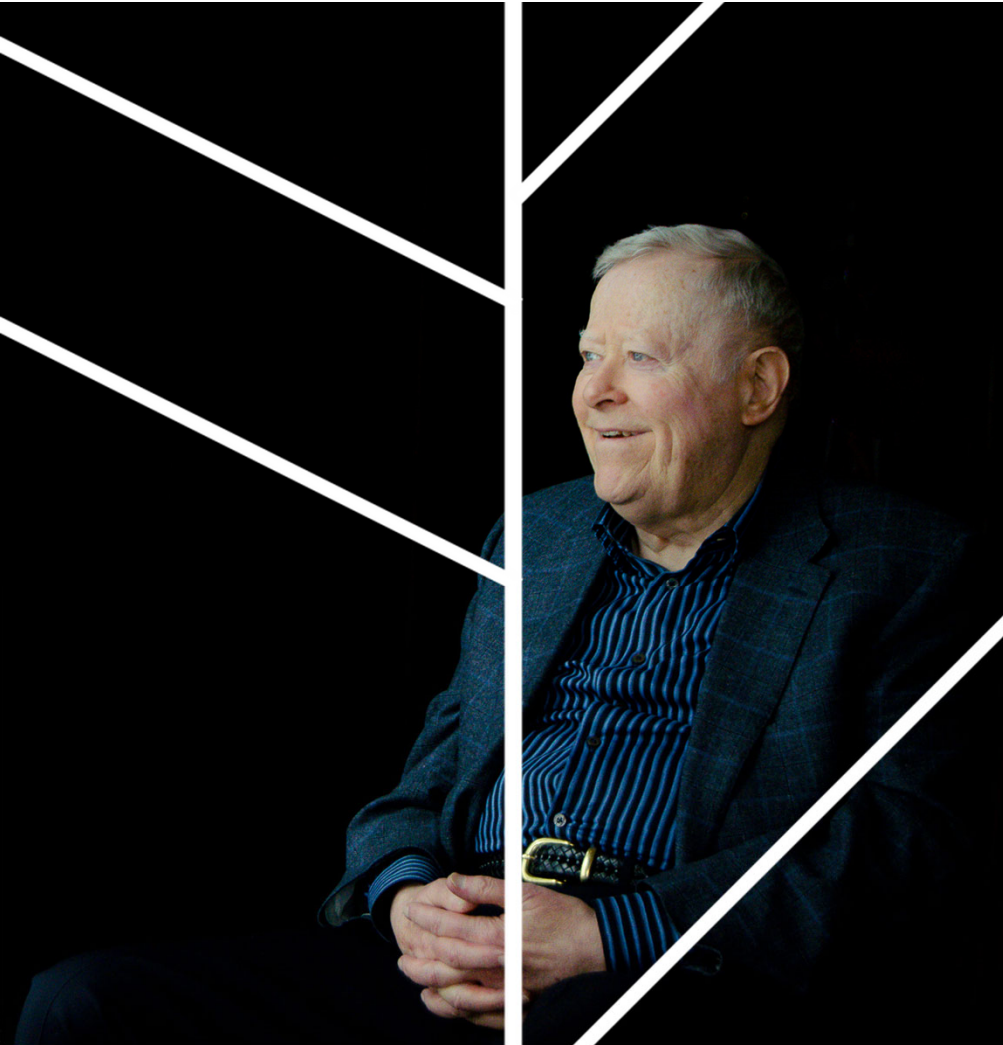
- How is the world better because I've lived?
- How would I like to be remembered?
- If I knew I was going to die tomorrow, what would I want to tell my loved ones?





“My blessing for you Dad is that on this your 80th birthday you know how much I have loved and love you...knowing that the best way to convey that love is living the values you’ve taught me with my children and children’s children...”

A LETTER TO DAD ON HIS 80TH BIRTHDAY



When might you write an Ethical Will?

- When facing or experiencing a challenging event or life situation.
- When going through a significant developmental stage in your life.
- When approaching the end of your life – a message of hope for future generations.

The Most Common Regret



Never taking the time to mend broken relationships and friendships or telling their friends and families how much they care.

DR. V.J. PERIYAKOIL, M.D. / THE LAST LETTER PROJECT



The Last Letter

- Acknowledge important people in your life
- Remember treasured moments
- Apologize to those you may have hurt
- Forgive those who have hurt you
- Say: *Thank you, I Love you, Goodbye*

Practical Exercise

- Make a list of the gifts you and your children have received from practicing your Catholic faith.
- **Example:** Giving children a Catholic education and receiving the Sacraments
- **Circle the 2 to 4 items for which you are most grateful.**





Practical Exercise

(Writing Space)

Here's my list...

Practicing my faith in my church:

- Deepened my relationship with my father.
- Introduced me to my life long sweetheart and wife Cathy.
- Helped me identify the 'ideal version' of myself and makes me want to be that person every day of my life.



Here's my list...

Practicing my faith in my church:

- Deepened my relationship with my father.
- Introduced me to my life long sweetheart and wife Cathy.
- Helped me identify the 'ideal version' of myself and makes me want to be that person every day of my life.

FAMILY

INTEGRITY +
PERSEVERANCE



How do I ensure my values are passed on?

Write a Legacy Letter!

A letter that entrusts to your loved ones your values and Catholic faith and explains how these values have influenced your philanthropy at the end of your life

Template for Writing a One-Page Legacy Letter

Dear Family:

Paragraph 1 // Provide Context: The purpose of this letter is to explain how the values that relate to our Catholic Faith influenced the charitable gift portion of our estate plan, particularly our decision to leave a gift to (our parish/our Catholic School or (fill in the blank)

Paragraph 2 // Tell the Story: One of the things we loved about our Catholic Faith or practicing our Faith in our parish or (Fill in the blank) was....

Paragraph 3 // Share the lesson/learning: As we near the end of our lives we realize how grateful we are for all the 'gifts' God has blessed our family with. We've tried to be good stewards of those gifts and now realize our stewardship doesn't have to end when we pass from this life...

Paragraph 4 // Offer a blessing: Our blessing for you is that you always appreciate the Christian values of stewardship that we have passed on and that you will pass these values on to your children one day.....



Legacy Writing Resources

Websites:

- www.ethicalwills.com
- www.life-legacies.com

Books:

- *Ethical Wills: Putting your Values on Paper* by Dr. Barry Baines, M.D.
- *Your Legacy Matters: Harvesting your love and lessons of your life* by Rachael Freed

Consider a Planned Gift



- ▶ Leave a legacy for your parish
- ▶ Receive tax benefits
- ▶ Use deferred or non-cash assets
 - ▶ Bequests in Will
 - ▶ Retirement assets, life insurance, stocks
- ▶ Make a difference today and forever
 - ▶ Donor Advised Funds
 - ▶ Endowments
- ▶ Receive a lifetime income
 - ▶ Charitable Gift Annuities
 - ▶ Charitable Remainder Trusts

A New Blessing App



“A blessing is a circle of light drawn around a person to protect, heal, and strengthen...”

JOHN O'DONOHUE / TO BLESS THE SPACE BETWEEN US

A New Blessing App



Name,
My blessing for you today is...
My wish for you is...
May you...

My Blessing for You



“Too many people go to their graves with their music still inside them.”

OLIVER WENDELL HOLMES, SR. / AMERICAN POET

Write an Ethical Will.
Leave them your music.

Your gift...

to an endowment fund at the Catholic Community Foundation will ensure they hear your song forever.

