

More Than a *Lifetime*

Over the years, you've created moments and achieved goals and built a life. These memories will outlast you and will live on through your legacy.

Your legacy also includes our community. The impact you make today can continue on indefinitely. Your influence, leadership, and vision—and the decisions you make now—can help our community move forward for generations to come.

No doubt you've given a lot of thought to what you want your legacy to be. Let's take the next step and put some of these ideas down on paper.

More Than *Yourself*

Planning your legacy is about making sure that the things that are important to you can carry on. Take a few moments to write down some of your thoughts.

1

PICTURE OUR COMMUNITY YEARS FROM NOW. WHAT DO YOU SEE?

What are the specific ways we can get there? What obstacles are in the way?

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2

WHAT ORGANIZATIONS HAVE BEEN IMPORTANT TO YOU THROUGHOUT YOUR LIFE?

Where have you volunteered your time? What organizations have you supported with meaningful gifts?

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WHERE ARE THE MOST IMPORTANT PLACES TO YOU?

Where have meaningful things happened in your life? What communities are important to you?

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4

WHAT ARE YOUR VALUES?

What causes are important to you? Circle words that ring true to you, and add more to the list, too.

- Family
- Wellness
- Equality
- Creativity
- Religion
- Education
- Joy
- Beauty
- Justice
- Adventure
- Kindness
- Stewardship
- Patriotism
- Service
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5

WHOSE LEGACY INSPIRES YOU?

Who came before you, mentored you, or are leaders you admire?

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6

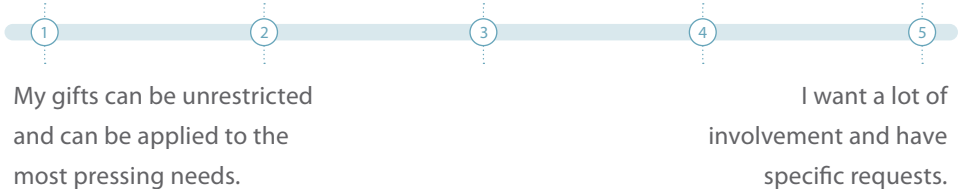
WHAT ASSETS DO YOU HAVE THAT CAN BE USED TO PROPEL OUR COMMUNITY?

Circle all that apply.

- a. Appreciated Stock
- b. Retirement Accounts
- c. Real Estate
- d. Business Interests
- e. Life Insurance

7

WHAT LEVEL OF CONTROL DO YOU WANT WITH YOUR LEGACY?



More Than an *Estate*

According to the AARP, more than half of American adults do not have an estate plan. And for those who do, a legacy giving component may have not been included, or it may need to be updated.

It's important to us that your final wishes be carried out, and that your legacy is everything you want it to be.

After you've filled out this sheet, it's time to formalize your plan. This sheet can help you, along with Omaha Community Foundation's Donor Services team, officially document your estate and solidify your legacy.



Omaha Community Foundation

Good grows here.

Contact us to complete your plan today.

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omahafoundation.org/legacy