

Your Legacy

By Chris Stotler on November 13, 2022

The topic I'd like you to think about this morning, and hopefully for a longer time, is "What is my legacy?"

I will discuss legacy in a broader view than just the financial side. Of course, I will also include a discussion of All Faiths 'Legacy program. And at the end of this message, we will dedicate our Legacy tree that was donated by Rev. CJ and Richard, and hang the plaque that lists the donors to the program.

What is a legacy? In the simplest terms it is what we leave behind after death to those who follow us. A legacy is something that is passed from one generation to the next. Often it refers to gifts of money or property.

But besides financial gifts, we also leave a personal legacy which involves more than the financial assets you bestow on the younger generation or an organization. It is how your family and others remember you. Your personal legacy ... how you are remembered ... depends upon how you live your life.

I like another definition of legacy: "your legacy is every life you've ever touched". I like this definition because it is personal. It speaks to how we live our life, the good ... or bad ... behaviors that others remember. If we want our personal legacy to be positive, then one needs to live the way they want to be remembered. It is the good examples we set for those following us and how we help others. It is how you are remembered by those you've helped or mentored or taught or been a role model for.

In other words, your personal legacy is your behavior. How you have you walked your talk and the example you've shown to each and every life that you've touched.

It's those small acts of kindness done well, and without expectation of reward or recognition, that find a special place in people's hearts. Those acts are important ... that's what makes up a good legacy. Actually, if we live our lives following our UU Principles, we will leave a positive memory.

Have you thought about your legacy ... how you want to be remembered? What are the values you would like to pass on to others? What is very important in your life that you would like to see continue and be supported after your death?

When I was thinking about these questions, I thought about my parents and the life lessons they left me. They set good moral examples, worked hard, lived within their means, emphasized family, and also valued family vacations. You never heard cussing or derogatory slurs used in our home. Manners were stressed and we had to eat the “proper way”, use utensils properly,... that is, the English way because Mom was English. These were lasting impressions that shaped my life and is the personal legacy they gave to me.

I also thought about how my daughters live their lives and the impression I must have made on them as they grew up. I am proud that I must have done some things right and set some good examples. Although ... they are type A workaholics and they tease me about setting that example.

In preparing for this presentation, I read some interesting articles about personal legacy and the need to write your personal story as a legacy statement, leaving that statement for your children, grandchildren, and / or others. It tells them what things you felt were most important in your life, what you valued, and what you considered your important contributions to your community.

Simply put, a legacy statement is a record of your hopes and dreams that may influence or inspire the next generation. It is not a record of all you have accomplished, apologies, or a list of failures. It is an account of the things that mattered most in your life, the lessons you learned, and the values you cherish most. In it, describe your faith and how it impacted your life and decisions. A personal legacy statement identifies what principles and values you felt were most important. It describes the roles you played in life – your family role, work role, and roles in the community ... all those roles are part of your story, your legacy.

As you write your legacy statement, give them personal insights into your heart:

- Describe a **meaningful story** from your parents and grandparents and how it influenced your life decisions.
- Describe what **made you laugh, made you sad, or made you stop to reflect?**

- Explain **significant giving decisions and the spirit of philanthropy** you hope the next generation will continue.
- Let the next generation know **what you most want others to remember about you**.

These are just suggestions. There is no perfect template for a Legacy Statement. Legacy statements are non-binding and can be in any format you want. You can find examples and tips online. But **do sign and date it. Share it now with the next generation** and leave a copy with important papers such as your will and estate documents. **Your life story might be the most important gift you leave to the next generation.**

Now, let's turn to financial legacy.

Finances are the most tangible part of your legacy — it's important to make sure you're leaving your loved ones in a financially manageable situation when you're gone.

One of the first steps to ensure a solid financial legacy is to be clear about where all your assets will go. Get your files in order. Discuss your files and finances with whomever will be responsible for settling your estate. One of the challenges we face is making sure our estate administrator knows the passwords to access files and accounts. Creating a **detailed will** or trust documents can help alleviate stress on loved ones by leaving nothing up to interpretation.

In addition to ensuring that your loved ones will be taken care of, also think about what organizations helped you in life or you are passionate about. If you're able, **put your finances to good use** and make a difference in the lives of others. If there is a particular charitable organization, project, or cause that is near and dear to your heart, making a bequest to them is an excellent way to leave a legacy that means something. You'll continue to help others for years to come.

Marsha and I will leave at least 80% of our remaining assets to our children. In addition, we examined what else has been particularly important to us and decided that there should be a gift to All Faiths and to the Guernsey County Library. Why these two? All Faiths is like family to us. You are our friends, our support group, our inspirational home, and All Faith does great things in the community as it lives its mission. We want to see All Faiths continue its programs and continue to have a positive influence on the lives of others.

We also have included the library in the town where Marsha grew up and where we lived before becoming Florida residents. The library influenced Marsha as a child in developing her passion for books and reading. We also used it a lot when we lived there. We want that library to continue to provide the many services in the community that goes beyond lending out books. Our financial gifts will help the programs that we feel are important and should continue into the future.

At All Faiths we have a pamphlet that describes Legacy Giving. [**HOLD UP BROCHURE**] The cover says “Who will carry forward the good work of All Faiths in perpetuity? I hope you say **I will** and be part of continuing our good work.

Making a Legacy Gift to All Faiths can help ensure our ability to continue to provide the kind of liberal religious experiences that we cherish. It can enable growth and help ensure the sustainability of this beloved community. If the beloved community of this congregation is important in your life, make it part of your legacy. If you have a strong commitment to making a difference in our community through social action, include All Faiths in your estate giving plans.

So what happens to a legacy gift that is given to All Faiths? Your gift will be placed in the Legacy Fund. This fund is conservatively invested and only used for special long-term benefits. It is not used for regular operations. Once a Legacy Fund reaches a certain size many churches use the interest from the fund for expanding on-going programs such as social outreach. As a relatively young congregation, our fund has not grown that much. How large could our legacy fund be in another 20 or 30 years? That depends upon what we all do **now** in our estate planning.

Next week, Barbara Goolsby will lead a workshop to answer your questions about legacy giving. She will explain the various bequest options that can be tailored to your financial situation. I will be available today to try and answer questions or you may contact Jeff Moran, Barbara Goolsby, me or call the office to obtain help.

Please join us and other members of this congregation in naming All Faiths in your estate plans.

I hope this presentation encourages you to act and make a commitment to grow our legacy fund. To date, there have only been 6 deceased members who left bequests or legacy

gifts. We want to honor them and all future gifts. Rev CJ McGregor and Richard Keelan donated a Legacy Tree ... hanging on the back wall of the Community Room ... that we are dedicating today. At this time, I would like Marge Digalbo, as Chair of the Board of Directors and our Congregation, to come forward.

Marge will place this plaque on the wall beside the Legacy Tree. It contains the names of those who have made legacy gifts so we can remember them and their contribution to our future. I will now read those names: Harold Miller, JO Ann Boyston, Lloyd Fish, Louis Pizzini, Martha Valiant, and Ed Fulker.

Names of those who donate legacy gifts in the future will be added to this plaque. May this plaque and the legacy tree inspire you to take action to support All Faiths.

We are **not** encouraging anyone to rush to get their name added in the near future. We want you around longer. But, we **do** encourage you to take the steps necessary for your legacy to include All Faiths before it is too late.

May it be so. Amen.