

Preparing for Retirement – Part III Creating Your Legacy List

Bill Searle

“What’s on your Bucket List? Here’s mine. It took a lot of time, but I’m starting on it already!” My friend was justifiably proud. Good for her. Well before retirement age, she was already not only determining her priorities, but also working on them! I congratulated her. Then, I asked her how she was doing on her **Legacy List**, and was rewarded with a quizzical look. She had no idea what I meant.

Simply put, a **Legacy List** is a list of the people and groups most important to you and how you want them to remember you. With all the doing in this world, it is easy to forget that it is the people in our lives that are important, not the things in our lives. A Bucket List is about **what you do**, a Legacy List is about **who you are**.

Maya Angelou said it best

“People will forget what you said,
People will forget what you did,
But people will never forget how you made them feel.”

Is this important to you? If so, do you want to leave their feelings to chance? Why? You spend time on many other things in life. Is it not important enough that you consciously work to help ensure that people remember you the way you wish them to?

Let’s get going on making sure that

“...people will never forget how you made them feel.”

1. List the **10 people** most important to you right now (go ahead and complain that there are more than 10, argue about who can be combined, etc – but list only 10).
2. For **each** of those 10 people, write **no more than three sentences** to explain how you think that person will remember you today. Do each person separately, even if at first it seems that your answers are very similar. You may find in the longer run that your answers will differ, even if only a little. Even seemingly minor differences are important because they may eventually lead to different behaviors.

NOTE: It is even better if you can ask each person to write, in three sentences, how they will most remember you.

3. For each person, write no more than three sentences to explain how you **want them to remember you**. Once more, do each person separately, even if at first it seems that your answers are very similar.
4. Compare how you want each person to remember you with how you believe they will remember you today. Where there is a difference between what you **want** them to remember and what you think they **will** remember, write down exactly what the difference is.
5. From the list above, identify three people that you will work on this month. What might you do to change the way you interact with them? Specify one thing you will do differently for each. Print off your list and put it someplace you will see it every day. You must do this because you need to change some things in order to make the time to do what you now think you must do.
6. To help keep your overall priorities clear, print the names of your 10 most important people off and post them where you will see the list every day. Hey, these are the most important people in your life – pay attention to them. This is also a handy reminder that you want to spend time with/for these individuals.
7. Mark on your calendar one month from today that you need to review your **Legacy List** to see if you are acting in accord with how you want these people to remember you. For each person on your list, give yourself a 'grade' for the month. After doing your grading, place a reminder on your calendar a month ahead to review your list again.
8. Once you feel you have changed your behavior and are now confident that you will continue to act/do/be toward an individual the way you want them to remember you, take that person off your list of three, add a new person and do points 4 and 5 above on that person. When all your grades are where you want them to be – you are done!

Whoops. No, you aren't.

You need a way to maintain your focus. There are many distractions in our world, and it is far too easy to lose track of what is **really** important to us (look back at the "Plan Early – Don't Have These Regrets" article if you don't believe that you can forget what is important). Once a year, place time on your calendar to review your **Legacy List** and update it as necessary. Give

yourself a final 'grade' for each person on the list for that year. Come on, you worked in a college – we all know what grades do.

Annually, as you move people to the 'grade' that you are happy with, you may wish to add additional people or groups to your list. For example, a faculty member may want to include her/his students as a group, or a Financial Aid Director may want to include his/her staff as a group. Just remember, never take anyone or any group off the list, so you always remember all of the important people in your life.

The following worksheet may be helpful to you.

Legacy List Worksheet

List the **10 people** most important to you right now:

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

For **each** person, write ***no more than three sentences*** to explain how you believe that person will remember you today:

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

For each person, write no more than three sentences to explain how you **want them to remember you.**

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Compare how you want each person to remember you with how you believe they will remember you today. Where there is a difference between what you **want** them to remember and what you think they **will** remember, use the following prompts:

How I believe _____ will remember me today:

How I wish _____ to remember me:

From the list above, identify three people that you will work on this month:

1.

2.

3.

Use the following prompt to identify what you will do to change the way you interact with the person you have identified.

Name:

How I believe _____ will remember me today:

How I wish _____ to remember me:

What I plan to do to change the current situation:

Monthly 'grade' (month/grade):

Annual 'grade':