

A living legacy checklist

Every day you're writing your legacy – is it one that reflects what matters most to you? Review this checklist for ideas on how to communicate your values through your actions at home, in the workplace and in the community.



YOUR CAREER LEGACY

- Expand your knowledge.** Leaders who commit to lifelong learning build more successful organizations. Online classes make it simple.
- Stretch yourself.** Take on new responsibility, make a big career leap – or if you're a business owner, take your venture to the next level.
- Check in as you move up.** A higher salary is reason to celebrate – and to take another look at your budget, emergency fund and long-term financial plan.
- Guide the next generation.** Get involved with mentoring via a company program, informally, or through an entrepreneurs group like [SCORE](#).
- Concentrate the right way.** Talk to your advisor about strategies to address any concentration you may have in company stock.
- Share your experiences.** A blog, podcast or book can be a great channel to offer wisdom to developing professionals.
- Unify and simplify.** If you have retirement accounts with former employers, talk to your advisor about your options.
- Address the future.** Whether you're a business owner looking to sell a firm or an executive thinking about succession, the time to start planning is now.

LIVE YOUR LEGACY YOUR WAY.

Get guidance that can help you create a lasting impact.