



The road less traveled:

Recording your life's journey for future generations

86% of Baby Boomers and their parents rated "values and life lessons" as most important to legacy.
– Allianz Company



Recording your story matters

- Keep your life lessons alive for generations.
- Preserve the essence of your successes and failures, the challenges you confronted, and your values.
- Tell the origins of your family wealth.

Questions to consider

- What values can I pass to preserve our family's future?
- What would it mean to you and your children to read your ancestors' stories in their own words?
- How will my ancestors remember our family's business success?

Getting started

- Write an outline.
- Select memorable life lessons and stories.
- Start a Legacy Statement.

How to capture your story



Autobiography

Documenting your stories in your own words can serve as a powerful living record of your trials and successes. Also consider keeping a daily log or journal.



Guides

Legacy guides take a more defined approach to recording legacy stories.

- Suggested guides: *Family Legacy Day Workbook*, produced by Key Family Wealth.
- "Words from the HEART: A Practical Guide to Writing an Ethical Will"* by Dr. Eric Weiner



Interviews

Have family members interview you on various topics, sharing an oral history of your life and values through video or audio recordings.



Family events

Consider hosting a facilitated Family Legacy Day with a Key Family Wealth advisor.

Family Legacy Days are dedicated events to which a family's legacy, values, and future vision are defined through group activities and engagement.

For more information about planning your legacy, [consult with your Key Family Wealth Advisor.](#)

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