



The Family Legacy Letter



Family Legacy Letter

Welcome to the Thornburg Investment Management Family Legacy Letter project! We hope you find creating your Family Legacy Letter a rewarding process.

The Thornburg Family Legacy Letter is one version of an ethical will. Ethical wills are based on an ancient tradition in which individuals write down their life stories, personal values, beliefs, blessings and advice for the benefit of future generations. A legal will conveys money and property; an ethical will is not a legal document. It might be thought of instead as a love letter to your family, a chance to share the essence of yourself for generations to come in an organized fashion. Though it is not a legal document, a carefully written ethical will can help defuse conflict and misunderstandings about the distribution of an estate. And when an ethical will is shared with family members before the end of life, it can foster new discussions about your legacy—financial and otherwise—and deeper connections with those you care about most.

Your instructions are simple: Just answer the questions below. The questions are meant to jog your memory and to serve as a starting point for your thoughts. Feel free to expand upon them and to ignore any that don't apply to you.

When you have completed your Family Legacy Letter, call your financial advisor.

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Childhood

Where did you grow up? How did you feel about your hometown(s) and why?

What are some of your best-loved memories of childhood—everyday experiences, vacations, holidays, friendships?

What are a few of the most important things you learned from your parents?

How did your parents meet, fall in love, and get married?

Childhood

What was your relationship with your grandparents? Where did they live? How often did you see them? What were the most important lessons you learned from them?

Were there significant people in your childhood who were not immediate family members but had a great impact on you? What was your connection to them like?

Where did you go to school—elementary, middle, high? Do you have vivid memories of any particular class or school event or events that shaped your life?

Where did you go to college and/or graduate school, or receive other higher education or training? How did you decide on your major field of study?

Love

Who were your closest friends in youth? Who are your closest friends now? How long have you known them? What has drawn you together?

When was the first time you fell in love or had a memorable relationship? What was that like?

How did you meet your spouse/partner? (If you have had more than one, feel free to describe one or all of them.)

How did you get engaged or decide to commit to one another?

Love

What was your wedding like?

What has most helped you and your spouse/partner build and maintain your relationship?

What are some of your cherished memories of your children when they were young? As they grew older?

If you have grandchildren, what has been special about your relationships with them?

Love

What are the most important lessons you taught your children?

Your Family

Who were your parents?

How did your parents influence your life?

Tell us about your children (names, birth dates).

Your Family

What are some of your cherished memories of your children when they were young? As they grew older?

What are the most important lessons you taught your children?

If you have grandchildren, what are their names and birth dates?

Your Family

What has been special about your relationships with them?

What has being a parent or grandparent taught you?

Work

How did you choose your profession(s)?

What was the best job you ever had and why?

If you are or were a business owner, how did you handle that responsibility?

Did you ever have a job or business that proved to be a terrible experience? What was that like?

Work

Did you have a mentor who taught and championed you at any time during your career?

Have you been a mentor to others in the workplace?

If you could change anything about your profession or career, what would it be?

Experiences

What are some of your most memorable experiences—good or bad—and how did those experiences change your life?

What are you most proud of doing during your life?

What problems have you had to overcome, and what did you learn from them?

Experiences

Have you had significant health challenges, and how have they changed your life?

Who influenced you the most and why?

What is a mistake you made, or a failure you experienced, that you hope your family members can learn from?

Beliefs

Do you have any religious or spiritual beliefs that have sustained you (regardless of your participation in organized religion)?

Do you have strong political beliefs—not just party affiliation, but values about how our government and society ought to function?

What are the most important values you would like to pass on?

Beliefs

What causes or social issues are important to you?

What civic, charitable and philanthropic organizations have you supported and served and why?

Legacy

What is your philosophy of life? What single principle has been the most important guiding force in your decision-making?

What is your philosophy of money or investing?

How do you define investment risk? How have you incorporated risk management into the way you have handled your money?

Legacy

When it comes to your investments, how important is preservation of capital?

What role has real estate played in your investments?

Has luck played a role in your financial success?

Legacy

Whose advice has helped you most in building and maintaining your investments?

When you think about passing on your wealth, what concerns you most?

What wishes do you have for your spouse/partner in the future?

Legacy

What wishes do you have for your children?

What hopes do you have for your grandchildren and great-grandchildren, or even later descendants?

How do you feel you have made a difference in your community or in the world?

Legacy

Do you have any significant regrets about your life? How have you coped with them?

What are you most grateful for?

For Fun

What is your favorite song or songs?

Name a few of your favorite movies, actresses and actors.

Name the books and authors that have influenced you most or that you have most enjoyed.

For Fun

What sports did you play?

What teams do you follow?

What are your hobbies?

What are your favorite foods? What restaurants or chefs do you like most? Do you like to cook yourself, and if so, what kinds of foods?

For Fun

What were your most treasured travel experiences? If you have a spot you have returned to often, or a second home, what did/do you love about it?

Who have served as your heroes when you were young or as an adult?

What sayings or phrases do you use most often?

Anything Else?

Is there anything else you'd like to add?

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