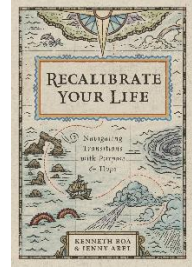


TOOL 15

Online Supplement to
Recalibrate Your Life: Navigating Transitions with Purpose and Hope



A Heritage Vision: What Are You Leaving Behind?

This tool offers a template for helping you think through your legacy—that is, *what you are leaving behind* when you die. In many ways, this worksheet is actually more about *what you are sending ahead* into the next life, as each component relates to your investment in the eternal over the temporal. This tool was originally created for the Heritage Forum (www.heritageforums.com) and is provided courtesy of the Christian financial planning firm [Ronald Blue Trust](http://RonaldBlueTrust.com).

Constructing Your Heritage Vision

Heritage Vision Worksheet

As I think about the vision I have for my heritage (what I hand down to those who come behind me), I acknowledge that it will contain some, if not all, of the following components.

1. **Know and Love God** (1 John 4:7–11)

Spiritual capital

- Do I have a growing and deepening relationship with Christ?
- What spiritual disciplines are part of my life?
- Am I passing these disciplines on to my posterity?

→ Write your vision for this area of your heritage. What does this look like for you?

2. **Enjoy Wife of Youth** (Ecclesiastes 9:9)

Social/spiritual capital

- What am I doing to invest in my marriage?
- How is my relationship with my wife now?

→ Write your vision for this area of your heritage. What does this look like for you?

TOOL 15 CONT.

3. Family (Psalm 78:5–7)

Social/spiritual capital

- What spiritual beliefs, values, and characteristics do I want to ensure my family learns from me?
- Do I have an intentional plan to convey them?

→ Write your vision for this area of your heritage. What does this look like for you?

4. Meaningful Purpose (Ephesians 5:15–17 AMP)

Spiritual capital

- Do I have a written purpose statement?
- What does one look like for me?
- Do I have a clear picture of the components of a godly purpose?

→ Write your vision for this area of your heritage. What does this look like for you?

5. A Balanced Life (Ecclesiastes 4:4–6; Psalm 127:2)

Social/spiritual capital

- How does balance look in my life?
- Would those who know me feel I am in balance?

→ Write your vision for this area of your heritage. What does this look like for you?

6. Accountability Friendships (Proverbs 18:24)

Social/spiritual capital

- Do I have a close friend or two who will tell me the truth and hold me accountable?
- Am I willing to be transparent with these close friends?

TOOL 15 CONT.

→ Write your vision for this area of your heritage. What does this look like for you?

7. Generosity (1 Timothy 6:17–19)

Spiritual capital

- Am I exhibiting generosity in my life?
- Does my family see me as a generous person?

→ Write your vision for this area of your heritage. What does this look like for you?

8. Ministry Mindset (2 Timothy 3:16–17)

Spiritual capital

- Does this mindset exist in my family?
- What could ministry look like for me at this time in my life?
- Am I involved in ministry now?

→ Write your vision for this area of your heritage. What does this look like for you?

9. Financial (Proverbs 27:23; Ecclesiastes 7:11–12)

Financial capital

- Estate—Does my current estate plan reflect my values?
- Business—Are my assets being left in a form that fits skills of recipients?
- Personal—Am I handling my money in a manner that allows me to balance life and invest in spiritual and social capital?

→ Write your vision for this area of your heritage. What does this look like for you?

TOOL 15 CONT.

10. Vocation (1 Timothy 5:8)

Social/financial capital

- Do I find fulfillment in and enjoy what I am doing vocationally?

→ Write your vision for this area of your heritage. What does this look like for you?

11. Work Ethic (Colossians 3:23)

Social capital

- Have I done anything that might undermine a work ethic in future generations?
- What does a work ethic look like to me?

→ Write your vision for this area of your heritage. What does this look like for you?

SUMMARY: List the **three actions** you will take by year end to begin to allow your Heritage Vision to take shape and sign below to validate your commitment to get started.

1. _____

2. _____

3. _____

NAME: _____