The Carter Center Presents:

Your Values and Your Legacy

Featuring: Patricia Angus & Stephen Johnson

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Patricia Angus, J.D.

- Founder and CEO of Angus Advisory Group LLC, a philanthropy and family governance consulting and education firm

- Adjunct Professor, Managing Director of the Global Family Enterprise Program, and Faculty Director of the Enterprising Families Executive Education Program at Columbia University Graduate School of Business

- A thought leader in the field of family governance and wealth who works with select families with multi-generational family businesses, trusts, and charitable foundations.
Stephen P. Johnson, J.D.

- Principal at Johnson Philanthropic, an advisory practice focused on foundations, nonprofit organizations, and philanthropic families and individuals.

- Senior Advisor, The Philanthropic Initiative, Inc. (TPI). From 1999-2012 served in various staff and management roles, working with families, foundations and businesses worldwide to define and achieve their philanthropic objectives.

- A principal author of the Code of Ethics for U.S. philanthropy advisors
Participant Poll # 1

• What was it about the session description that prompted your attendance today?
   A. I’d like to know how to define my values
   B. I’m working on my estate or philanthropic plans
   C. I help others with their estate or philanthropic plans
   D. Other
Values

• “Something such as a principle or quality intrinsically valuable or desirable.” Merriam-Webster
Legacy

• “Something transmitted by or received from an ancestor or predecessor or from the past.” Merriam-Webster
Participant Polls # 2 and #3

• #2: Have you created a personal values or mission statement?
  A. Yes    B. No

• #3: Has your family ever done a values exercise together?
  A. Yes    B. No
Identifying Your Personal Values

- Formative experiences
- People who have influenced and helped shape you
- Three of my defining values are ...
- Creating a personal values statement
Participant Poll # 4

- Are your personal values aligned with your family’s values?
  
  A. Not at all
  B. A little
  C. Somewhat
  D. For the most part
  E. Absolutely
Identifying Your Family Values

• Are your values in line with your significant other’s?
• Overlap and intersections among individual values
• If I were designing my family crest, the words and symbols I would include are ...
Participant Poll #5

• Does your estate plan reflect your values?

A. Not at all
B. On the whole
C. Very much
D. I don’t know
E. I don’t have an estate plan
Defining Your Legacy

• A prophetic tale

• Defining your legacy

• Ensuring your values are incorporated into your legacy
Outcomes
Strategies
Goals
Mission
Vision
Focus
Values
How Do Values Inform and Guide Your Philanthropy?

- What is philanthropy?
- Values as the foundation
- President Carter’s values
- Values as informing focus
- Style
- Internal and external relationships
Participant Poll #6

• If today were your last day alive, would you be comfortable with your legacy?
  A. Yes
  B. No
Leaving Your Legacy

• Be intentional
• Be comprehensive
• Seek alignment
• Include your family
• Focus on living your legacy
• Allow room for change and evolution
Q & A