

THE CARTER CENTER



The Carter Center Presents: ***Your Values and Your Legacy***

Featuring: Patricia Angus & Stephen Johnson

Hosted By: Barry Nickelsberg, CAP, Chief Development Officer for Estate & Gift Planning
&
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Thank You for Your Trust

We would also like to express our gratitude for allowing us to serve as your resource; it is a privilege to be trusted to provide you with information about these important topics.



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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





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**



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Q & A

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