



Legacy Worksheet

For Executives Considering What's Next

Created by Dave Smith – [The Ultimate Retirement Coach](#)

1. Legacy Without the Title

Without mentioning your job title, company, or awards, write 3–5 sentences that describe how you'd like to be remembered.

What values did you live by? What kind of impact did you have on people's lives?

Example:

"I helped people grow. I made hard decisions with integrity. I showed up when it mattered."

Your Legacy Statement:

2. The Roles You Played Outside of Work

List important roles you've held in life **beyond** your job. Then write a short note on what made each meaningful.

Role	Why It Mattered
e.g., Mentor	Helped younger leaders gain confidence and clarity
e.g., Parent	Provided love, support, and stability to my family
e.g., Volunteer	Supported causes I deeply believe in

3. Values That Define You Now

Circle (or highlight) your top 5 values from the list below—or add your own.

**Integrity | Growth | Family | Service | Wisdom | Freedom | Adventure | Learning |
Compassion | Creativity | Contribution**

Others: _____

4. One Next Step

What's one action you can take in the next 7 days to live more in line with your *non-work legacy*?

Your legacy isn't what you did—it's who you were while you were doing it.

— Dave Smith

