

We had some beautiful summer weather last week. When the sun shines, on a slow summer day, I often feel nostalgic. I was remembering one of my early jobs after graduate school. I was 29 years old. My entire estate consisted of a car, a piece of original art and half a dozen Jones NY business suits. I was working with a volunteer who was an estate attorney, and I sat down in his office and wrote out my first will.

We had a lovely conversation about my family, my interests, my thoughts about my legacy. Who would I want to help if I could? What charities were important to me? My first will had a remainder clause in it. It said if my heirs predeceased me, my "estate" would go to my favorite charity, at the time, my college. Not much of a legacy. The sum would probably not have amounted to more than about \$5,000, but it was more than any check I could have written to my college at the time.

That little clause has stayed in my will and expanded: when I got married, when I bought a home, when I had children. Each time I've rewritten my will, I've thought about my legacy and what people and places I wanted to help. Thinking about philanthropy as more than an annual check to a charity, but as a legacy statement is powerful. It has made me think what is most important to me. A legacy gift will be the final time I give to charity. What places are that important to deserve to be the places where I make my final gifts? The answer is deeply personal and terribly important.

I hope you spend some time this summer pondering those same thoughts. Find a lovely sunny spot on a clear day and think about what brings you joy. Think about your charitable dreams, and then make them a reality by putting a clause in your will, adding a beneficiary to your life insurance policy or retirement fund, or putting money into a trust to endow your annual fund gift. Call me! I'll sit in the sun with you, and we can drink lemonade and talk about legacy.