

Memories of The Day You Were Born

A Purposeful Visioning Exercise

“Before you were born I loved you...before you were here for an hour I would die for you”—Maureen Hawkins

The purpose of this Purposeful Visioning Exercise is to capture the positive emotions and most memorable experiences around the birth of your child and your child’s early years. It will also give you an opportunity to preserve heartfelt expressions of love for your child, and the hopes and dreams you have for their future.

KEY POINTS BEFORE WE GET STARTED

- * The “Memories from the Day You Were Born” Visioning Exercise is designed to trigger precious memories you have of the joy and wonder which accompanied the birth and early years of your child.
- * A famous 19th Century scientist noted our voice is the most powerful transmitter of emotions. Writing captures emotion but recording your voice captures the exclamation points of emotion and speaks most powerfully to your family members.
- * You can choose to type or write out your answers to the questions.
- * You will also have the option of preserving your reflections as a digital recording. It can be something which will be listened to by your child, and even yet unborn grandchildren or great-grandchildren. We call that a Purposeful Conversation.
- * If you record the answers I can share with you economical and efficient transcription services we have worked with. The transcript can be edited and used with the creation of your Purposeful Trust™ or Purposeful Gift.

“Love recognizes no barriers. It jumps hurdles, leaps fences, penetrates walls to arrive at its destination full of hope.”
—Maya Angelou

Memories of The Day You Were Born A Purposeful Visioning Exercise For Fathers

- * What special moments of anticipation did you experience as you waited for your child to enter the world?
- * Were you present when your child was born? If so, what was that experience like?
- * When did you first hold your child and what was that moment like?
- * What names did you consider giving your child and how did you settle on the name you finally chose for your child? What special significance does your child's name carry for you and them?
- * Do you remember your child's first steps? What feelings did you experience as your child began to walk?
- * Do you have any other special memories of your child's first year? First three years of life?
- * Did your child have a special way of letting you know how much they loved you? Did you have a special way of letting your child know how much you loved them?
- * Do you remember a moment when your young child demonstrated great trust or faith in you and how did that make you feel?
- * Did your child struggle with medical challenges or physical adversity at birth or in their early childhood years? If so, what feelings did you experience when you saw your child in great pain or distress and what would you have done to take that pain or difficulty away?
- * Do you remember any of the special gifts you purchased or made for your child when they were an infant or a young child?
- * What were the favorite books you read to your child or the favorite melodies or songs you would hum or sing to quiet or comfort your child? Why did you choose those books and songs and did they hold special meaning for you?
- * Was there anything your child did as a baby or young child that would make you smile, laugh, or cry? What was it and how did it impact you and how do you feel about it today?
- * What is the kindest or most thoughtful gift or deed your child ever made or did for you when they were young? In the last 6 or 12 months?
- * What are the fondest memories you have about your child's birth and early childhood?
- * What are the talents or strengths which makes your child so exceptional? If you were given "cosmic permission" to assimilate one of those gifts or special skills into your own life, which would it be and why?



Is there anything else you would like to say to express your love or your hopes and dreams for how your gift(s) to your child will positively impact their life?

Memories of The Day You Were Born A Purposeful Visioning Exercise For Mothers

- * What special moments of anticipation did you experience as you waited for your child to enter the world?
- * What do you recall about the labor and delivery experience?
- * What did it feel like when you first held your child? Were you amazed at the beauty and tininess of your baby? How would you describe what your child looked like then?
- * What names did you consider giving your child and how did you settle on the name you finally chose for your child? What special significance does your child's name carry for you and them?
- * Do you remember your child's first steps? What feelings did you experience as your child began to walk?
- * Do you have any other special memories of your child's first year? First three years of life?
- * Do you remember a moment when your young child demonstrated great trust or faith in you and how did that make you feel?
- * Did your child struggle with medical challenges or physical adversity at birth or in their early childhood years? If so, what feelings did you experience when you saw your child in great pain or distress and what would you have done to take that pain or difficulty away?
- * Did your child have a special way of letting you know how much they loved you? Did you have a special way of letting your child know how much you loved them?
- * Do you remember any of the special gifts you purchased or made for your child when they were an infant or a young child?
- * What were the favorite books you read to your child or the favorite melodies or songs you would hum or sing to quiet or comfort your child? Why did you choose those books and songs and what did they mean to you?
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- * What are the talents or strengths which makes your child so exceptional? If you were given "cosmic permission" to assimilate one of those gifts or special skills into your own life, which would it be and why?



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“I Won the Child Lottery”

A Purposeful Visioning Exercise

There are only two lasting bequests we can hope to give our children. One is roots; the other, wings.”—Carter Hodding

The purpose of this Purposeful Visioning Exercise is to capture the positive emotions and most memorable experiences around your child’s growing up years. It will give you an opportunity to preserve heartfelt expressions of love for your child, and the hopes and dreams you have for their future.

KEY POINTS BEFORE WE GET STARTED

- * The “I Won the Child Lottery” Visioning Exercise is designed to trigger precious memories you have of the joy and pride you have felt as your child has grown up.
- * A famous 19th Century scientist noted our voice is the most powerful transmitter of emotions. Writing captures emotion but recording your voice preserves the exclamation points of emotion.
- * You can choose to type or write out your answers to the questions.
- * You will also have the option of preserving your reflections as a digital recording. That Purposeful Conversation will be listened to by your child, and even yet unborn grandchildren or great-grandchildren.
- * If you record the answers I can share transcription services we have worked with which could provide an affordable transcript that can be used with the creation of your Purposeful Trust™ or Purposeful Gift.

“We don’t want to control from the grave. We want to be a positive and sustaining influence in the lives of our children. The best way to do this is to lead a life you’d like them to emulate and to powerfully capture and preserve your love and wisdom for their benefit, and for all those who follow after them.”
—John A. Warnick

During the revolutionary war era, a gentlemen would no more leave his home or quarters without his sword then without his pants! It is very difficult for us today to appreciate how important a symbol the sword was in society. A sword was a status symbol for civilians.



One of George Washington's Swords

To a military officer it was an emblem suited to his rank and often worn as a visible reminder of his bravery. Swords often served to connect one generation of a family to another as they would be handed down from the person who had worn them to his posterity.

So it isn't surprising that we would find a gift of swords in Washington's will. What is unusual, however, is the wording of that gift. As you read these words, which are taken exactly from his handwritten sixteen page will, please consider if you hear the voice and vision of General Washington:

To each of my Nephews, William Augustine Washington, George Lewis, George Steptoe Washington, Bushrod Washington and Samuel Washington, I give one of the Swords or Cutteaux of which I may die possessed; and they are to chuse in the order they are named.—*These Swords are accompanied with an injunction not to unsheathe them for the purpose of shedding blood, except it be for self-defense, or in defense of their Country and its rights, and in the latter case, to keep them unsheathed, and prefer falling with them in their hands, to the relinquishment thereof.*

We know George Washington received many swords as tokens of recognition of his courage, service or greatness. He also purchased other swords which he used for a variety of purposes beyond military service. Washington gave several swords away during his lifetime to recognize another individual's valor. There were at least seven swords left in his estate at his death.

You might be interested to understand the significance of the swords which his nephews were allowed to chose from so I will share some detail about two of those swords and where you can see them today.

CLARITY AND SIMPLICITY: THE POWER OF UNDERSTANDABLE DOCUMENTS

The Trust with Your Voice and Vision

Understandable documents have an enduring power. Clients and their heirs enjoy reading a document which not only captures the voice of the grantor but also is designed to be understandable. Tax and other important clauses are inherently complex. But we can demystify that complexity when we use the tools of “Overview Boxes”, “Explanation Boxes” and glossaries.

KEY POINTS

- * Clients often ask, “Why can’t you draft a trust/will that my children and I can understand. Isn’t there a way to make my estate planning documents understandable without sacrificing the tax power?”
- * Capturing the client’s voice goes a long way towards humanizing the documents and giving them a personality and soul. But we really demystify the complexity that shrouds estate planning documents when we learn how to skillfully use “Overview” and “Explanation” boxes.
- * Scott Farnsworth began using these techniques in his estate planning documents over 15 years ago and found that the clients loved this approach so much that they didn’t want him to take them out of the documents.
- * A glossary of key terms and concepts is another step towards a more understandable document.

We can make the documents more understandable by utilizing the techniques of Overview and Explanation Boxes.

Here is an example from a revocable trust where the client wanted to explain why he was choosing to leave approximately \$2.5 million to his sons at his death and the balance of his assets would be given to charity:

Intent and Overview

I want my sons to receive something from me at the time of my death. If you only looked at this Trust you might get the mistaken impression that I've left nothing or little to my sons. That is not at all true. In addition to the cash gifts I've made below of \$10,000 which will be delivered to my sons shortly after my death with a "West Virginia Miner's note" I have prepared for each of them, there will be approximately \$2.5 million added to the GST Exempt trusts which I have previously established for my sons. The balance of my assets will pass to our family foundation to avoid incurring estate taxes at my death.

I want my sons and anyone else who will read this document to understand that I have created two other trusts which will benefit my sons. The first of these trusts were the GST Exempt gift trusts which I created for each of my sons and funded with the largest amount which I could leave to them during my lifetime without paying gift taxes, which was approximately \$500,000 for each of them. I have seen that amount grow, through careful investment and tax planning, substantially since I made those gifts. The second is the 2007 Trust which came to me through my father and which I control at my death through a power of appointment. Before making distributions from the Family Trust to either of my sons, the trustees should consider whether it is better to make a distribution for that purpose from either the gift trusts or the 2007 Trust.

Here is an example of an overview box used in the Trustee Succession provisions of a revocable trust to explain what the HIPPA release included in the trust was all about:

Overview

The Health Insurance Portability and Accountability Act (HIPPA) is a federal law that governs the release of medical information. It is intended to protect the privacy of patients. However, it can become a formidable obstacle for trustees when they are dealing with beneficiaries, grantors or co-trustees whose health or mental capacity may be threatening their ability to function from a legal standpoint. The language which follows allows the trustee or successor trustee to function as a medical agent and to be able to get whatever information they might need to determine whether the grantor is incapacitated.

Article 7.02. Release I specifically authorize the individual or individuals nominated by me as successor trustee (“my individual successor trustee”) to ascertain whether I am incapacitated and to obtain my medical records and to confer with any physician to the full extent necessary to make such determination. When in the process of determining my incapacity, all individually identifiable health information and medical records may be released to my individual successor trustee including any written opinion relating to my incapacity that my individual successor trustee may have requested. This release authority applies to any information governed by the Health Insurance Portability and Accountability Act of 1996 (HIPAA) 42 USC 1320d and 45 CFR 160-164. The authorization in this Article 2.04(a) shall constitute a medical durable power of attorney, and as such, my individual successor trustee, as medical agent, shall constitute my personal representative within the meaning of 45 CFR 164.502.



WHEN TIMES GET TOUGH

It will happen. Each of you has already had a taste of disappointment and adversity. It's never easy when we are in the middle of it...when you don't see the light at the other end of the tunnel. I really haven't talked about it with you but now I'm thinking there may be some value in sharing this with you. It probably won't hit you or your descendants the same way it struck me. We were cruising along...we had purchased our first home. I got into a power struggle with the department chairman. I didn't have tenure. I went three years without a raise, no recognition of my writing or research, and a much heavier teaching load than any other professor. The economy cratered and budgets were cut. I was told my faculty position was being terminated. I slipped increasingly into depression which made it even more difficult to find a job. We couldn't make our mortgage payments and foreclosure was imminent. Your mother's parents tried to help us out. There weren't food stamps in those days and unemployment had run out. I finally was admitted to a sanatorium and went through shock treatments. Your mother was deeply worried I'd take my life and the thought had crossed my mind but it was my love for you and your mom which I clung to in those moments of desperation...and my faith in God. But I was angry at God. Why had this injustice happened to me? The miracle happened at Easter. I realized one day that everything I was going through didn't even come close to what Christ had endured. I read His invitation to cast my burdens on Him and as I did I was impressed to volunteer at the old folk's home three blocks from our home. I would read to those who couldn't see. Mrs. Cunningham was one of those seniors I read to. We'd read but usually she just wanted to talk. One afternoon she started to tell me about her son. I discovered he was a college professor and more remarkably he was the department chair at the University of XXX in my field. When she learned I had lost my position at XXX College she immediately asked me for my C.V. and she said she would send it to her son and see if he could help me find a teaching or research position. The rest is history. That is how we got to XXX. When things are darkest don't focus on your troubles. Exercise your faith. When you lose yourself in the service of others your problems grow smaller or your ability to carry them increases. And, sometimes from the most unlikely source God will connect you to the next great chapter in your life. Don't ever lose your hope or faith. I love each of you and am so proud to be your father.

***“You Will Understand the Power of the Purposeful Trust
When Your Client’s Child Turns to You and Says: I Never
Knew That When I Read My Dad’s/Mom’s Trust I Would
Hear Their Voice”***