A discussion rooted in **values**

Why have values-based conversations?

We live in a time characterized by change, but values are constant and can provide a strong foundation for important life decisions. Whether discussing financial or estate planning, charitable giving or leaving a legacy, identifying and understanding core values and family values can bring meaning and guidance to your clients' decisions.

Having values-based conversations with your clients will…

- Provide a deeper understanding of what matters most to your client.
- Enable you to align their estate and wealth planning with their values.
- Establish you as a steward of their values and legacy as well as their assets and plans.
- Help you build a relationship with the next generation.

Facilitator's Guide

Pre-discussion instruction for your clients

To help me get to know what matters most to you and your family, please bring to our meeting one or more items that represent values you hold dear. Your items could be objects, photographs or documents. If you prefer, you are welcome to bring images of the items on your phone. For example, you could bring a photograph of a mentor or relative, an item or document representing an important moment in your life, or something you have inherited.

Discussion prompts

Use the ones that are most relevant to the focus of your work or the topic of your meeting.

1. What is the object/photograph/document?
2. What value does it represent to you?
3. Did you inherit this value from someone?
4. How is this value evident in your life?
5. How does this value inform your hopes for your/your family's future?
6. Is this value part of the legacy you hope to leave to your heirs? To the community?
7. Do you feel this value is represented somehow in your current estate plans?

Capture the Image with permission through scanning or a description in your notes.

Additional ways to use this tool

- Have this conversation with an individual client or a couple to get to know and understand them on a deeper level.
- Facilitate this conversation among multiple generations of your client's family, providing a powerful and unique shared experience.
- When discussing estate planning, have them bring an item that represents a value they want to pass on to the next generation(s) of their family or to their community.
- When reflecting on the legacy of a loved one your client has recently lost, have them bring an item that represents a value they inherited from that loved one or a memory they treasure.

Questions? Contact Vicki Dansky at **vdansky@rcfdenver.org** or 303.398.7422.

ROSE COMMUNITY FOUNDATION

The **Living Legacy Tapestry** at Rose Community Foundation

When we learn of a charitable bequest to Rose Community Foundation, we become not only the steward of the financial assets, but also of the values that informed that remarkable decision to make a difference beyond one's life.

Created by Leah Sobsey and Lynn Bregman Blass of visualhistorycollaborative.com, the Living Legacy Tapestry is an artistic archive of those values. Every image on the Tapestry represents something significant and personal to the donor: a mentor or treasured relative, a meaningful moment, a motto, a way of life. As these unique images blend together, the Tapestry safeguards the legacies of thoughtful, caring people devoted to making the world a better place for future generations.