Men's L· ife - Journey, Architecture & Legacy

Partnering with POWERPIVOT GROUPS FOR MEN and MALE MENTALITY

Updated 5/27/24

MEN'S LIVING LEGACY

Expressing Full Potential ➔

Building a Living Legacy

The King's Journey to Destiny –
The Extraordinary Adventure Manifesting One's Mission for Self and Other, Making a Difference and Advancing the Human Spirit

Rough Draft

You

Our Life's Domains

1. Expressing Capacity in all 'Our Life's Domains'

Having garnered increasing full potential in 'All One's Roles' this 1st section of Living Legacy focuses taking it out into the world and eing an positive influence in all the Domains of Your Life: home, community, institutions, work, professional association, fraternal order, schools, alma mater… Also supporting you uplift the group aspirations you identify with: gender, ethnicity, culture, race, disability, age... Plus helping advance the highest ideals of state and nation.

2. Living Legacy Support Plaform

The 2nd section describes Living and Leaving a Legacy for you, with your family, organization, business... Besides planning for Legacy you leave behind, there's the one you passionately live now. Living Legacy is about transformative service, 'fire in the belly' – Purpose – Mission – Vision now. What concerns are there for the world you influence, what Problems do you, you, your family and those you are connected towant to help solve. What is your Platform and Program?

LIVING LEGACY

3. Enterprise Launch & Development Services

An Innovation Incubation, Launch & Strategic Development Platform Ensuring a Triple Bottom Line
for Inventors, Entrepreneurs, Innovative Execs., Creative Mgnrs.

P P P
People, Planet, Profit

The 3rd Living Legacy section describes forthcoming services that facilitate incubating, launching and expanding your commercial (social) enterprise – 'Triple Bottom Line' (People, Planet, Profit). This is your comprehensive envisioning and manifesting your commercial aspirations from intraneurship to new social enterprises. As you'll soon explore we have decades of delivering resources, services and programs to aspiring entrepreneurs. Social enterprises are designed to make a positive difference in what and how they offer their products and services – for adding value to those within and clients/customers.

Sample Deliverables

- Business Concept Vetting
- Business Plan, Exe. Summary
- Financial Strategy, Financials
- Presentation Pitch Deck
- Phased Strategic Develop. Plan
- Team Recruit & Org. Culture
- Management Systems & Tools
- Capital Structuring & Formation
- JV's, M&A's, Licensing
- Compliance, Risk Mitigation
- Team Recruit & Org. Culture
- Marketecture
- Coaching, Mgmt. Mentoring

…

LIVING LEGACY

4. New Vision Charitable Trust

A Launch Platform for Building Legacies that Make a Difference

Organizations/Institutions; Communities; Enterprises; Planetary

Transformatively & Charitably Serving

1. Envisioning
2. Manifesting
3. Empowering
4. Trans-forming &
5. Sustaining

Together - We Explore, Design and Launch New Visions – Creating Inspirational Models, Synthesized into Mosaics, and Sustainable Archetypes. We Provision Resources - Templates and Tools for Being the Change we Envision; Creating Collective Transformative Action. "Points of Light"

The 4th section is platform for manifesting your mission and vision for a non-profit project, a charitable initiative. Decades of experience in developing Strategic Solutions augment you clarifying the need/problem you wish to address and build (non-profit) program that implements your Vision. These services also facilitate your organization (place of work, school/alma mater, fraternal order, charity, professional association, workplace…) create an impactful destiny. As needed you can utilize the support services of the enterpise launch platform for phased development.

"A People Without a Vision Perish"

Men's Life - Journey, Architecture & Legacy

Partnering with POWERPIVOT GROUPS FOR MEN and MALE MENTALITY

MEN'S LIVING LEGACY
Expressing Full Potential ➔

Building a Living Legacy

The King's Journey to Destiny –
The Extraordinary Adventure Manifesting One's Mission for Self and Other, Making a Difference and Advancing the Human Spirit



Our Life's Domains

Part 2 - Living Legacy Support Plaform

Rough Draft

Updated 6/1/24

Dear Coheart & Cohort,
The 2nd section describes what constitutes Living and Leaving a Legacy for you, with your family, organization or business. It notes the traditional Financial Planning for Leaving a Legacy but puts it in the context of having it serve the core concerns you want to make a difference. There may be a core needs or a vision for solving problems that you personal, family, organizational and work may focus on, including starting a Donor Advised Fund.
Yet most importantly besides planning for Legacy you leave behind, there's the one you passionately live now.
Living Legacy is about transformative service, fire in the belly – Purpose – Mission – Vision now.

With Appreciation,
Love, Douglas

The Need: Two phenomena are intertwined: Societal coherence is under siege, "Without a vision the people perish," and large population is moving to retirement and then their estimated $125 trillion transfer of wealth. Individuals, families, organizations… need a sense of purpose bigger than themselves, 'With a vision the people flourish.'

If you want to know the future, create it.

Purpose
Profoundly serve individuals and families who wish to: lead fulfilling and meaningful lives; make cherished memories; invest in their Vision, live and leave legacies.

Mission
Be an integrated source of information, comprehensive programs and seamless services for individuals, their families to living 'life as a legacy', creating living legacies, and leaving lasting legacies. Provide organizations, institutions, and communities with tools and resources to leave profound legacies.

Goals
- To facilitate people to fully know their life purpose, their unique passion in helping others, their mission to make a difference.
- To support people manifest their dreams for self and others, to live balanced fulfilled lives, thus living in the legacy of their aspirations, while living their vision and fulfilling their destiny.
- To create and manage financial wealth, family legacy trusts, memory filled estates, that build multi-generational legacies.
- To provide a dream project incubator and for launching people's mission driven organizations and enterprises.
- To assist individuals (and organizations) investing their money in what they care about, in order to make money while making a difference.
- To provide gifting services to place their money where it counts, establishing foundations and their philanthropic endeavors for families and corporations.
- To create living eulogies for all of us & those whose transition approaches
- To help make multi-generational memories through establishing Living Testimonies, Family Legacy Estates, Memorable experiences.

Table of Contents

Welcome Introduction
Personal/Family Services,/Programs
Living Legacy Trust Fund
Business Financial Legacy Services
Org. & Corporate Giving Intro
Corporate Strategic Giving

LIVING LEGACY

Building a Living Legacy

Part 2 - Living Legacy Support Plaform

Living Dreams & Leaving Legacies; Manifesting Missions & Realizing Visions

You

Our Life's Domains

Resources, Services & Programs

Full Life Spectrum of Living One's Legacy to Traditional Leaving a Legacy

Rough Draft

Updated 5/28/24

Individuals Living and Leaving a Legacy

Engaging Life Purpose, Manifesting Mission,
Realizing Vision and Fulfilling Destiny
Creating Financial Freedom to work on Vision
Living Balanced, Full Potential Lives

Living the Dream Legacy Services

Co-op Ownership of 2nd homes & retreats
Legacy Family Travel Adventures
Creating Sacred Spaces

Organizations Living and Leaving a Legacy

Guiding Values Based, Mission Driven Organizations with Servant Leaders & Purpose Guided Teams
Building Balanced, Full-Potential Businesses and Organizations

Creating, Managing and Leaving Financial Legacies

Managing Personal, Family and Organizational Wealth

Sudden Wealth Services and Wealth with Wisdom Support

Creating Financial Legacies - that arise from your mission and fund new vision. "Secrets of the Millionaires Mind."

Purpose Driven Investing & Giving

Living Legacy Projects -
Incubating Your Dreams, Investing in your Vision (i.e. Self Directed Roth) Utilizing the Living Legacy Launch Platforms

Living Legacy Investments -
in What You Care About, Making Money While Making a Difference

Endowing Your Vision, Strategic Gifting
- Strategic Giving, Maximizing Impact
- Establishing Donor Advised Fund, Family Foundations, Charitable Trusts
- Purpose Aligned Philanthropic Endeavors for Families & Organizations

Making Multi-Generational Memories

Living Eulogies - Creating a Living Testimony to Those We Love and Want to Honor
Family Legacy Estates - Building Family Assets that Serve Now and the Future
Creating Memorable Experiences - A Guide for Families Building A Legacy of Closeness

Being Prepared and Carrying on the Legacy

Establishing Family Legacy Trusts - that keep your financial legacy out of the courts and away from the government
Preparing Succession Arrangements - for Valuables, Businesses, and Family Foundations
Planning for Care and Transition - for yourself & those you love
Creating Living Eulogies - for those whose time to back over is nearing

When the Time Approaches or Arrives Unannounced: Supporting those in need when physical life ends

Gentle Closings -
Preparing Self and Supporting Others When the Time has Come

Honorary Memorial Web Sites -
to those who have made the transition

The Life After -
Resources to Support Those Who Fear the "Next Experience"

Participating in The Living Legacy

When this platform was originally envisioned it was conceivable that this might be movement for Living and Leaving Legacies, especially given the great transition of wealth in and from Boomers.

Becoming a Member of the Living Legacy Society

Becoming a Living Legacy Emissary:
Ambassadors Associates Affiliates

Becoming A 'Partner' in Living Legacy
Customizing for your organizing, Licensing Living Legacy in Your Area, Strategic Service Ally

Living Legacy Inc. Shareholder Investor

Living Legacy Credit Card

Living Legacy Career Services

Gifting to the Living Legacy Foundation

Trust Fund Introduction, Overview Resources, Services & Programs

Dear Explorer & Enthusiast,

Welcome to the Trust Fund for *increasing the impact of social investment capital and supporting profitable projects meeting needs and making a difference.* The following programs are fundamental to the success of the Trust and exemplary models everywhere. These services will be developed as the capacity of the Trust expands to realize the mission below.

MISSION

Exponentially increase the availability and impact of social investment capital while supporting progressive projects make a difference and make a profit. Facilitating individuals, families, and organizations invest seed capital in their own progressive products, programs and services while helping designing the capital structuring and formation vehicles for others to invest in their success.

The Fund Goals are to:

1.Raise Capital for the Trusts social enterprises, for profit programs and services.

2.Provide Capital Structuring and Formation services for allied enterprises, especially those that leverage the overall Trust initiatives.

3.Offer Investors & Capital Managers investment opportunities with Life Enhancing Enterprises, sustainable businesses with a triple bottom line, especially those that have innovations core to the Trust mission.

4. Develop creative capital mechanisms, i.e.: Crowd Funding, Biofuel Mutual Funds, Renewable Energy Hedge Funds, Institutional Portfolio non-equity expansion loans using off take or product purchase agreements…

5. Create Living Legacy Investments and Loans for individuals & families, institutions & companies making a world of difference. Support people and organization leaders utilize a portion of their portfolios to invest in enterprises missions they are passionate about, programs they want to see initiated, projects they want to see reach critical mass. These are more than strategic investments they are about creating a Family or Corporate Living Legacy now.

6. Weave all the initiatives above into an integrated and comprehensive Trust Capital Program – Investing in Our Future.

Introduction to the Trust's Fund Programs & Services

The proposed Trust Fund Programs & Services are in four categories: 1. Information and eventually services for Investors, Investment Services Providers, & Portfolio Managers; 2. Investment Programs serving individuals, organizations & corporations; 3. Trust related investment opportunities; 4. Capital Development Services for social enterprises and business with life enhancing products.

There will be tools and resources as well as annotated links to visionary investment programs and capital development models. Centrally included in this will be testimonials, blogs, social media for visionary and informed innovative investing.

Trust Fund Navigation Bar & Menu Pop-Outs

The following sample table of contents represents what will be available as the Vision site and its Service develop.

Investor & Portfolio Services - *Investing in Progressive Enterprises Making Money while making a Difference*

Individuals, Families & Groups;
Institutional Portfolio Managers;
Financial Planners

Investment Brokers
Loan Officers
Grant Officers

Investment Programs - *Facilitating Individuals Invest in what matters, Families in legacies that make a difference, institutions utilize portfolio program investments, & corporations strategically invest in related technologies & causes...*

Living Legacy Investment; Corporate Strategic & Legacy Investing; Social Enterprise Investing: Humanitarian Investing

Trust Enterprise Investments - *Launching & Expanding Development Trust Allied Enterprises, Accelerating Growth & Return*

Enterprise Development Trust Projects; EDT Strategic Partners; Tipping Point Investments

Capital Development Services - *Launching, Accelerating Growth & Return for Trust vetted Enterprises*

Capital Structuring and Formation: Development Loans and Grants, Private Placements, Legacy Mutual Funds. Hedge Funds for Innovation

LIVING LEGACY

Part 2 - Living Legacy Support Plaform
Corporate Living Legacies
An Overview and Business Case for Strategic Philanthropy
Creating, Living and Leaving Legacies for Organizations, Institutions and Enterprises

You

Our Life's Domains

Rough Draft

Investing in What Matters, Giving to What Makes A Difference, and Launching Projects that - Create Goodwill, Ingratiate Communities, Honor Investors, and Unite the Company.

Updated 5/27/24

Mission for Strategic Giving & Corporate Citizenship

To Powerfully Augment Corporate Mission, Values and Goals, Through Strategic Giving Planning and Development That Leverages - Philanthropy, Investments, and Community Involvement in order to Exponentially Impact Stakeholders, Customers, Recipient Partners and Global Constituents.

To Implement Integrated and Comprehensive Programs that Demonstrate Social and Business Impact Fostering a Significant Legacy of:

Admired Corporate Citizenship and Global Goodwill;
Respected Professional Innovation and Contribution in Corporate Giving;
Deeply Appreciated Social Caring and Gratifying Community Improvement

To Produce Measurable Internal and Quantifiable External Results

To improve employee relations and professional development (recruitment, retention, morale, loyalty, motivation and productivity, supplies positive internal messaging for Communications departments)

To improve customer and investor relationships (increases customer loyalty, acts as a tiebreaker for consumer purchasing, enhances brand image
Answers concerns raised by socially-aware shareholders to Investor Relations, "Legitimated Refusal")

To **improve business performance and development** (positively impacts bottom-line return, increases competitive advantage, encourages cross functional integration ,CEO and Other Senior Executive Involvement, Provides relationships that can be tapped for various human resource initiatives (Diversity, etc.)

To enhance a company's marketing and public relations efforts (Brand-Building and Awareness, helps create a positive company image, helps a company manage its reputation, supports higher prestige prices, enhances government affairs activities. Generates charitable activities that can be developed into marketing vehicles

Background for Increased Strategic and Focused Giving

Summary of Factors Increasing The Emphasis on Strategic Giving
Mergers and Acquisitions - integrating new possibilities; 9/11, Tsunami and Katrina - Increasing shareholder interest; Government Legislation - Patriot Act due diligence; Corporate Developments: Meeting Obligations of Growing Company as expand "footprint' in U.S. and foreign soil; Responding to "First Movers" (Early Adopters who expanded giving and it's strategic benefits for recipients, partners and stakeholders); Aligning with Business Priorities; Increasing Social Return on Investment

Research Findings on The Results of Successful Giving:
The more initiatives stakeholders are aware of, the more they think these programs are effect and the more fit they see with the identify of the company - the more favorably they rate the company in terms of specific types of giving (e.g. cash), and in terms of overall company philanthropy. … Higher overall perceptions of corporate philanthropy lead to more favorable high-level attitudes that support business success. Higher overall perceptions of corporate philanthropy lead to higher likelihood of acting in ways that help the company experience business success.
Enhancing Positive Attitudes: Overall Reputation; Positive Public Image; Good Corporate Citizen; Admire for its good deeds; Generosity differentiates company; Feel a sense of good will toward company; Give benefit of doubt if negative publicity

Percentage Distribution to Recipient Programs
Health and social services 36.8%
Education 26.9%
Community and Economic Development 10.6
Civic and Public Affairs 6.4
Culture and Arts 5.7
Environment

Core Guidelines for Improving Strategic Giving

1. Apply the basis of strategic planning to corporate giving, setting a clear vision, mission, goals, and objectives with action plans and performance measures.
2. Streamline giving into a few specific issue areas in which the company wishes to make an impact.
3. Focus on areas that align with core competencies of the business. For example, an engineering company might contribute to math and science education, a pharmaceutical to healthcare, etc.
4. Focus on those areas that correlate societal challenges with business challenges. For example, an oil and gas company helping to explore sustainable.
5. Define in many instances, an approach of enlightened self-interest, in which the company sets out to support areas that balance community needs with business objectives. An example is to support public schools which provide a more educated workforce in the long term, and create a more attractive climate to recruit top staff in the short term.

LIVING LEGACY

Part 2 - Living Legacy Support Plaform
Corporate Living Legacies
An Overview and Business Case for Strategic Philanthropy
Creating, Living and Leaving Legacies for Organizations, Institutions and Enterprises

You
Our Life's Domains

Rough Draft

Investing in What Matters, Giving to What Makes A Difference, and Launching Projects that - Create Goodwill, Ingratiate Communities, Honor Investors, and Unite the Company.

Updated 5/27/24

Components of Organization Development For Strategic Giving

1. The Strategic Plan for Corporate Giving Impacting:

- Corporate Citizenship, Social Responsibility, Public and Investor Relations
- Customer Loyalty, Cause Marketing, Identify Branding
- Corporate Spirit and Employee Development
- Strident Public Needs Through Partnerships and Signature Campaigns
- Community Engagement and Local Development

2. Senior Management Engagement

- On Company Giving Initiative Boards/Committees/Plan Development
- Non Profit and Partnership Board Placement Programs
- Participation in related capacities with Non-Profit Partners
- CEO as Cause Spokesperson

3. Staff Engagement, Employee Development, Corporate Spirit

Employee Giving Campaigns; Matching Gifts
Employee Directed Funds (Donor Advisor Model)

Volunteer Strategies, Volunteer Program Management
Impact Day - Everybody gets the same day off to work on a project
Hands-On-Network (Corporate Month of Volunteerism)
Community Days - day off during Week of Volunteerism
Paid Time Off : 4 hrs a month; Flexible Scheduling; Dollar-for-doers programs $100 to the non-profit for every 24 hrs volunteer up to $200 annually
Employee volunteer recognition awards; Retiree volunteerism programs; Family volunteering; Team Grants

4. Third Party Engagement

Leverage business relationships (e.g. vendors, suppliers, wholesalers, etc.) to enhance philanthropic Commitments (via additional funding, in-kind resources, employee tie, etc.)

5. Interdepartmental Engagement

- Executive Leadership in values based, mission driven, strategic giving, investing and project development.
- Human Resources for augmenting company identify, team spirit, including retention.
- Public Relations
- Community Affairs -build local community goodwill: governmental bodies and agencies, NGOs, and citizens.
- Communication: Stakeholder awareness that company is engaged in giving initiatives that "fit" with the identity of the company, ensure that initiatives are effective and are perceived as effective

6. Internal Communications

7. External Communications

Strategic Giving & Corporate Citizenship Programs

Leveraging thinking, time, resources and money to exponentially impact recipients/partners and the companies overall mission.
Three Types: Charity, Strategic, Commercial
4 Basic Forms: Cash, Volunteerism, In-kind, Noncommercial sponsorships

1. The Strategic Philanthropic Focus
Venture Philanthropy - Signature Programs - Branding
Donor Designated (Employee Designated)

2. Community Involvement and Participation
3. Non-Profit Partnerships
4. Collaborations - Intra-Industry (i.e. Suppliers)
- Inter-Industry (national cause)

5. International Programs -
For engendering foreign governmental goodwill, local stability, and sustainability in regions exporting resources

6. Gifting Programs that Support Employee: Education, Training, Social Services & Well-Being
"We Care Grants" up to 10k for personal needs during personal crisis and natural disaster, emergency, family crises.
Housing for Employees (Equity Share Loan fund for first time home purchases.)
Educational Gifts and Loans
...

7. Corporate Values and Mission Related Giving Programs,
i.e Diversity Grant Programs, Environmental, Educational

8. Programs for National Recognition & Distinction
I.e. Achievement Awards at National Association Conferences

9. Disaster Relief -
Tsunami, Terrorism, Hurricane, Earth Quake,

10. Investment Programs
A. PRI - Program Related Investments from Pension Fund & Corporate Portfolio
B. Companies that deliver giving related products & services
C. Sustainable Resource Development Companies

11. Programs for assisting R & D through strategic granting, including University Technological Transfer

12. PAC Programs that Serve the Greater Good.

13. Social Responsibility (Corporate Citizen) Indexes