

The Legacy Canvas

A 4D legacy model: financial, intellectual, relational, spiritual—measured across time horizons.

TIER: BOARD / FOUNDER / HOUSEHOLD

TAG: STEWARDSHIP · SUCCESSION · DURABILITY

EXECUTIVE SUMMARY

- Legacy is not a speech; it is a system built in time.
- Most leaders track only financial legacy and then act surprised when everything else collapses.
- Durability requires multi-dimensional measurement and leading indicators.

OPERATING LOGIC

Why four dimensions

Money without wisdom is waste.
Wisdom without relationships is sterile.
Relationships without formation decay.

Why time horizons matter

3 years measures execution.
10 years measures institution-building.
25 years measures what out-lives you.

Why leading indicators

Collapse shows up late.
Leading indicators surface drift early.

APPLICATION PLAYBOOK

1. Step 1 — Map the current legacy

Write current state across the four dimensions.

'Output: Legacy Snapshot.

2. Step 2 — Define the 25-year anchor

What must be true in 25 years?

'Output: Legacy North Star.

3. Step 3 — Convert to 10-year capabilities

List capabilities required: governance, culture, succession.

'Output: Capability roadmap.

4. Step 4 — Install 90-day moves

Choose three initiatives that compound toward the anchor.

'Output: 90-day sprint plan.

5. Step 5 — Cadence + accountability

Monthly review; quarterly reset; annual audit.

'Output: Legacy review cadence.

KEY METRICS

Succession readiness	Durability requires transfer, not personality dependence.	Quarterly
Relational health signals	Relational debt is a silent killer of institutions.	Quarterly
Knowledge capture rate	If knowledge is in heads, the institution is fragile.	Monthly
Formation rhythm adherence	Formation is slow; without rhythm it never happens.	Monthly

BOARD QUESTIONS

- ? *What are we building that still works when we are no longer here?*
- ? *Where is the institution dependent on one personality?*
- ? *What relational debt have we accumulated?*
- ? *What formation practices are installed, not merely admired?*