

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

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| 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 outlives you. | Why leading indicators Collapse shows up late. Leading indicators surface drift early. |
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APPLICATION PLAYBOOK

- Step 1 — Map the current legacy**
Write current state across the four dimensions.
'Output: Legacy Snapshot.
- Step 2 — Define the 25-year anchor**
What must be true in 25 years?
'Output: Legacy North Star.
- Step 3 — Convert to 10-year capabilities**
List capabilities required: governance, culture, succession.
'Output: Capability roadmap.
- Step 4 — Install 90-day moves**
Choose three initiatives that compound toward the anchor.
'Output: 90-day sprint plan.
- Step 5 — Cadence + accountability**
Monthly review; quarterly reset; annual audit.
'Output: Legacy review cadence.

KEY METRICS

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| 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?