

## ***Welcome to the Legenis monthly newsletter***

We are currently in the process of relocating our offices. This should have little impact on your dealings with Legenis, as we have little face-to-face contact with our valued customers, associates and stakeholders. Our new contact details are contained in Article 2 below.

I hope you enjoy this month's articles.

Warmest regards,  
**Dr Robb Musgrave**  
CEO, Legenis

*Legenis: Leaving a lasting legacy for families, foundations, corporations and non-profit communities by empowering them to do the right things, by doing things right.*

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### **Article 1**

## **The Joy of Giving** by Dr Robb Musgrave

When I was a child I remember being told, **“it was much better to give than to receive”**. Well like most children I didn't see it that way. Particularly, the mornings of Christmas were never early enough and pre-dawn seemed a great time to wake up to see what Santa had delivered with excitement and expectation. It was all about what I was getting. Unfortunately my parents were never as keen to jump up early and we had a family rule that no one could unwrap presents without the whole family present. Which of course meant two things, that the presents should be touched, felt and shaken and that my parents, with our assistance, needed to get up very early as well. I am sure those of you who remember Christmas with young children will relate.

As I got older and hopefully wiser, I started to understand what was meant by

the saying. When we had a young family, I found the substance of the quotation for I could relive the excitement and enthusiasm of the gifts through my children's eyes. We had become the givers.

People often find their purpose and reward by realising **'it is better to give than to receive'**. We are reminded just how much fun it was to get presents as children. As grown adults we connect back to the child within us by giving a gift and watching the pure joy of another enjoying our gift. Grandparents relate to this through these different generations. The pure joy and enjoyment of giving can be much wider than just our immediate family; it can extend to gifts for special friends and to others with greater needs than ours

This is one way of adding an extra dimension to our lives. By looking forward and adding value, you can fulfil your life's purpose and deliver enjoyment to yourself by providing assistance to others. By giving of yourself and your gifts and talents you get the greatest joys and that becomes a wonderfully selfish emotion.

### **Everyone can make a difference**

The process of making the world a better place involves two things: knowing precisely what it is that you have and secondly a 'consciousness as to what you want to do with it'. Professor Paul Schervish of Boston College suggests, this is where your true North, your values and your life reflected program come into play. Even if we do not hold enormous wealth, we are all in a position to make the world a happier place in some way. For philanthropy the objective is to raise the standards of mankind and that can be achieved in a multitude of ways.

The important thing – no matter how wealthy we might or might not be – is that we ask ourselves the following very important questions in relation to our social legacy:

*How do I want to be remembered?*

*What kind of impact on society do I wish to have?*

*What concerns me in the world?*

*How can I make a difference?*

*What are my philanthropic or personal goals and desires?*

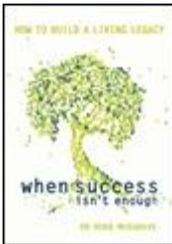
Maureen Wheeler, founder of the Lonely Planet travel books, highlights the misconceptions we have of philanthropists themselves: 'My immediate image of a typical philanthropist is a Rockefeller-type person sitting in a vast room lined with leather bound books and Persian carpets, getting letters from poor people, and sending out cheques. This is another common misconception. Does this look like you, I doubt it?

*People with little wealth can and do contribute to society in many valuable ways: by giving small donations or volunteering their time and specialist skills.*

Australians have among the highest level of volunteers in world societies. Do you have a church, a school, a neighbour, or a local charity that you could help in some way? Regardless of which philanthropic path you might choose to take, **'it is better to give than to receive'**.

Giving, allows us to prepare our family, to experience once again the joy from childhood that comes to us from sharing and helping others. It allows us to be significant in the lives of other people, including those people and organisations we care about. **Everyone who is loved by someone will leave a legacy in some form.** What will yours be?

**If you would like information on how you can give most effectively and start living your legacy please contact Robb at [robb@legenis.com](mailto:robb@legenis.com) or on +61 7 3395 1213.**



***"How to Build a Living Legacy? – When success isn't enough".*** by Dr Robb Musgrave.

This book will take readers on a journey of personal discovery for "when success isn't enough". Most of us think of legacies in purely financial terms – a monetary gift or a family home. *When Success Isn't Enough!* overturns that assumption and shows that it's our values, not our money, that make us unique, but which also ultimately shape our legacy. Few are remembered for the money alone! Available online from [www.legenis.com](http://www.legenis.com) You can contact Robb at [robb@legenis.com](mailto:robb@legenis.com) or on +61 7 3395 1213.

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## Article 2

**Legenis new premises**  
505 Old Cleveland Rd, CAMP HILL Q 4152



As we advised in our September newsletter, we are relocating our offices. We were hopeful that this would have been completed by the end of September 2009. As with most moves, not everything has progressed as smoothly as we would have liked. We completed the move as of Monday 26 October 2009 and extend a warm invitation to you, to visit us at the new office.

**New phone and fax numbers**

P +61 7 3395 1213

F +61 7 3324 8122

*Email and postal address details remain the same*

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**Article 3**

***What can Legenis do for you?***

***Private Briefings***

At Legenis, we are working to develop close associations with advisers and charities, to encourage their clients or donors to discover new possibilities for themselves and their families. We feel this will be best achieved through private briefings, small personal gatherings of clients who can receive specific information and ask detailed questions. If you would like to organise a private briefing for your clients or donors then contact Legenis on 07 33951213 or email [info@legenis.com](mailto:info@legenis.com)

## ***Generating Living Legacies***

Your legacy is personal to you. It is the sum of your life, your personal assets, your legal and tax structures, your financial assets, and beyond material possessions – it is about who you influenced and whose lives you've touched and how. Values form the basis of all Legenis processes.

## ***Values based profiling***

In discovering what is really important to people, at Legenis we make use of our unique [valgenics®](#) process. This online tool is used to determine a persons dominant values. Using a clients dominant values advisors can position themselves most effectively and offer a differentiated value added service for clients, making them indispensable because all advice is focused on what is important to clients.

## ***Family Succession Planning***

Legenis assists family advisors in working with clients using our unique values profiling to identify the values that drive client decision making rather than just focusing on money to successfully transfer their family wealth and their legacy to the next generation. Legenis offers a dynamic solution to the problem of only 30% of families successfully transferring wealth from the 1<sup>st</sup> to the 2<sup>nd</sup> generation by preparing heirs. We prepare heirs for assets rather than assets for heirs, it is a big difference towards a successful outcome.

## ***Legenis - Living Foundations***

Establishes and importantly provides ongoing administration services to family and corporate foundations. We offer complete turnkey services supporting advisors and their clients from Installation to ongoing compliance, governance and administration. Legenis- Living Foundations, enables philanthropic giving to be more strategic, more effective, long-lasting and very tax effective.

## ***Dr Robb Musgrave, MBA PhD***

Dr Robb Musgrave PhD, MBA is founder and CEO of Legenis. Legenis specialises in helping people structure their living legacies based on their values, evolving from research from Robb's doctorate, "Creating Personal Legacies". He is also experienced in Estate and Succession Planning and has run successful insurance and financial planning practices for almost 30 years. Robb is also a Fellow of the AFA and AIM. He is a Life and Qualifying Member of MDRT. For further information please visit [www.legenis.com](http://www.legenis.com) email [robb@legenis.com](mailto:robb@legenis.com) or phone +61 7 3395 1213.

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[www.legenis.com](http://www.legenis.com)



**Legenis Pty Ltd**

PO Box 88 Coorparoo Qld 4151 Australia **ABN** 20 115 007 246

**Phone** 1300 302 191 / 61 7 3324 2791 **Fax** 61 7 3324 2833

**Email** [info@legenis.com](mailto:info@legenis.com)