

“THE GUARDIAN’S ROADMAP”

What I Want My Children’s Guardian to Know About Nurturing and Successfully Launching My Child in Life Purposeful Visioning Exercise

The purpose of this Purposeful Visioning Exercise is to help create guidance for your child’s guardian. Hopefully, you’ll live to see your child(ren) reach adulthood. But if you should pass away while they are still minors, this roadmap will be invaluable to your chosen Guardian and greatly benefit your child(ren).

KEY POINTS

- Parents often spend much more time leaving instructions for a weekend babysitter than they do providing meaningful guidance for a Guardian, who in reality is a permanent baby-sitter/nurturer for your child.
- It’s important to consider all of the decisions you’ve made as a parent which affect your child. Some of these decisions involve important relationships such as where your child goes to school, who are the doctors, dentists and other health care providers serving your child, etc. This exercise will help you provide a comprehensive list of those providers as well as helpful instructions about your child’s special needs
- Routines are important in the lives of our children. This exercise will help you catalog the routines which your child expects in their life and which the Guardian might be completely unaware. You’ll be asked to identify the absolutely critical routines. You don’t need to spend time describing routines which may need to be modified to fit the new circumstances the Guardian will be thrust into, unless, of course, you feel it’s very important to do so.
- The Guardian’s Roadmap also allows you to indicate your preferences about faith, values, life experiences, and parenting philosophies. No doubt you’ve chosen your child’s prospective Guardians carefully so that they align well with your values and parenting philosophy and style. But specific guidance from you in this area will be very informative to your Guardian.
- The Guardian’s Roadmap can also operate like a “life compass” which the Guardian can refer to whenever they face difficult situations or critical questions along the life path of your child to better discern how you might have handled that situation.
- There’s a companion exercise which you might also consider completing. We call it the Parenting Bucket List. It allows you to create not just for the guardian but also for yourself a list of the very important trips, events, celebrations you want to be sure your child experiences. The Parenting Bucket List will help you be intentional about how you plan for the years between today and the time when your child will leave the nest.



Step 1:

In the list on the next page are seven different forms of Guidance Parents have left in the Roadmaps they have created for their children's Guardian(s). Please read the description of each category placing a ✓ next to each category which resonates with you.

What Do I Want To Include In My Guardian's Roadmap?

- ☐ 1. Daily/Weekly/Frequent Routines
- ☐ 2. The List of the Most Important People/Providers in My Child's World
- ☐ 3. Programs, Activities, and Traditions
- ☐ 4. Hazards and Detours
- ☐ 5. Likes and Dislikes
- ☐ 6. Your Family's North Star Guidance System
- ☐ 7. Thanks
- ☐ 8. What's It All About

Is there any other form of Guidance you have thought of including in your Guardian's Roadmap? What might that be:



Step 2:

- Now we get to the fun part of the exercise. Look at the ✓ you placed next to those categories which resonated most strongly with you .
- Next, find the instructions for the most important of these categories below. Start working your way through that category's instructions. Write or dictate your thoughts and feelings as you go. Then, if you'd like, please share what you've come up with us and we'll be happy to help you consider if there's anything you've overlooked
- At that time we can also provide ideas about the best way to share and preserve this exercise for the benefit of the Guardian. There's no more tragic a loss than having expended the time and energy to capture great guidance for your Guardian and then not be able to get it to the Guardian. So we should coordinate how this exercise is going to be preserved and shared.



1. **Daily/Weekly/Frequent Routines:** What are the key routines your child has become accustomed to? The nature and importance of these routines will depend on the age of your child. But most guardians would have no clue what these routines are and often your child may not be able to articulate or meaningfully describe these routines to the Guardian.

List at least three routines from your child's daily/weekly/monthly life which you would like to include in the Roadmap. It could be bedtime routines; get ready for school routines; homework routines; setting out clothes routines; chores around the house routines; birthday or other special celebration routines. Which of these routines do you feel would provide normalcy, comfort and continuity in your child's life if suddenly you were not there to guide them through their routines.

Why has each of these routines proven to be so valuable to your child? Why do you think it will be of great value to the Guardian to continue in these traditional routines?

Makes notes of the important details behind each routine. Then write or dictate a description of the story behind the routine and why it has proven to be of such great value to your child. Now that you have finished listing the routines you came up with are there more that have emerged? Are there any routines you've contemplated introducing your child to at some age appropriate point in their life? Keep going until you are satisfied you've captured all of the important current routines in your child's life and any which you envision will become important to introduce to them in the future.



2. **List of the Most Important People/Providers in My Child's World:** Who are the doctors, dentists, orthodontists, optometrists, and other medical providers you've entrusted your child's well being to? Who are the nurturers (such as day care providers, babysitters, after school programs) you rely on to help you in parenting your child? Are there others you've thought of that should be mentioned and what do they assist you or your child with? Do you need to mention anything about how you compensate these providers?.

What are the names/phone numbers/addresses for each of these very important people in your child's life and what exactly do they provide to your child?

What about the nurturers (day care providers, babysitters, after-school programs) you rely on in parenting your child? How do you compensate/tip these individuals? Are there any individuals you would strongly, strongly recommend be retained, if at all possible? Are there others that could easily have been replaced by you because you don't feel the individual is absolutely critical to a successful relationship with your child?

What about teachers, coaches, etc? Are there special strengths, quirks, or expectations these individuals possess which your Guardian should be aware of in their interactions with them?



3. **Programs, Activities, and Traditions:** What are the programs/activities which your child is currently engaged in? How do you participate in those activities and would you expect the Guardian to play a similar role? What are the family traditions which you'd like to make sure are either continued or introduced to your child at some future date and who else might help the Guardian understand those family traditions?

Think of the programs and activities each child is currently engaged in or which they'll get involved with in the course of the next year or couple of years. Make a list of each such program and activity and provide the contact information for who you'd suggest the Guardian contact to understand what is entailed in keeping your child actively engaged in that program.

Think of at least one family or personal tradition that you love and would like to see carried on by your child(ren) and the Guardian for the benefit of your family. Why is it so important to you, how did it get started and how can it be supported by the Guardian and perhaps other members of your family going forward?

Who could the Guardian speak to in order to understand how to honor and implement that tradition? Can you describe it for the Guardian? What would you want the Guardian to share with your child about the importance or meaning of this tradition?

Think of at least one experience, trip, or adventure, etc. that proved to be so valuable or memorable that you would like to see the Guardian make sure happens for your child(ren). What was it, how did it change or enrich your life? When and how would you suggest to your Guardian or children they plan on doing something similar?



4. **Hazards and Detours:** Are there special challenges which lie ahead in the life of your child(ren) which you need to alert the Guardian about? Have you made some mistakes in your parenting decisions which you'd be willing to share with your Guardian so they don't make that same mistake themselves? Are there situations in your child's life that you'd protect them from or avoid at all costs?

What are the "hazards" or special challenges lying ahead of your child? Have you any advice for the Guardian on how to deal with those challenges?

Do you have an example of a parenting decision you now view as a mistake and what lessons you learned from that failure or mistake?

If you could be granted a "Parenting Mulligan" to do something over that affected your child, what would you take your first do-over on and how would you handle or approach that situation differently?

What can you say to your Guardian about the importance of forgiving ourselves and/or seeking forgiveness when we hurt or harm others through our mistakes?



5. **Likes and Dislikes:** What are the things in life your child loves/hates? Which of these preferences are so important to your child that you feel your guardian should be aware of them? Are there any favorite one-liners or phrases you are used to sharing with your child when you giving them encouragement or support about pursuing their interests or dealing with things they dislike or find difficult?

Start thinking about a list of your child's favorite likes and their most intense dislikes. It could be diet related (example "my child hates carrots), school or activity related, tv programs, books or games. Can you come up with your top 10 Favorites list? Do you need to provide any color to the Guardian to help them understand how important this is to your child or what you tend to suggest or substitute when you can't or choose not to give your child their exact favorite?

What about the dislikes? How do you deal with these? Do you have any guidance for the Guardian on honoring or not honoring your child's preferences?

What about terms of endearment, favorite sayings or truisms you share with your child? If the Guardian is unaware of these a wonderful part of you and your child's shared vocabulary may be lost.

Are there any favorite books, movies or personal activities which you've not introduced your child to which you'd like the Guardian to bring to their attention someday? Anything you might want them to share with your child to help them understand WHY this was important to you, how you felt about it, or why you wanted to make sure they got exposed to this book, movie or activity?



6. **Your Family's North Star Guidance System:** Glimpses into the faith/values which are important to you and your family. Advice for your guardian on the moral compass you'll hope they'll help instill in your child. Are there important religious or charitable activities, pathways, celebrations which you'd strongly encourage the Guardian to expose your child to?

Please describe any mottos, mission statement or tangible objects or mementos which serve as a personal North Star to guide your child(ren) in their life journey?

If there was someone you admired and used as a model for creating and living a meaningful life, who would that be and what did you learn from them? Is this something you'd like your Guardian to share with your child(ren), and if so when?

If you could look out fifty years and see the life values which your child has embraced and honored in their life journey, what would be the five most important values you'd hope they emulate? Is there something you'd like to share with your Guardian or child about the importance of one or more of those values?

Is there a faith tradition you would like to see honored in the upbringing of your child? If the Guardian's doesn't share or practice that faith tradition what does your Guardian need to know about it, what it has meant to you and what you hope it will mean to your child(ren)?



7. **Thanks:** Being a Guardian is a huge responsibility. What words of appreciation and/or encouragement do you want to leave to your child's Guardian?

Why did you choose the individual you've named as Guardian or Successor Guardian for your child(ren)? What are the special strengths, character traits or values you admire in them and which you feel will make them Great Guardians?

How important is this role of a Guardian? What feelings of gratitude or appreciation do you have for their willingness to serve your child in that capacity?

It's very easy for a Guardian to second guess themselves or to say to themselves I can never be as good a parent/nurturer for (Your Child) as XXX was. Is there any encouragement you can offer them to help them know that they'll do a great job? Is there any way to put into words the "eternal" debt of gratitude you'll owe to them for their sacrifices and efforts on your child's behalf?



8. **What's It All About:** If you were to sum it up in fifty words or less, what are the most important big picture guidance you can leave the Guardian(s)? Is there any short but sweet suggestions you have for the Guardian which will help them know how to maximize the opportunities they have to be a positive influence in the life of your child(ren) and/or fulfill their responsibility as a Great Guardian?

List at least three key points you would like your Guardian(s) to remember as they become your child's CNO (Chief Nurturing Officer) after your death?

If you were to give your Guardian a concise statement that would help them remember the most important facets of the job they are undertaking, what would it be?

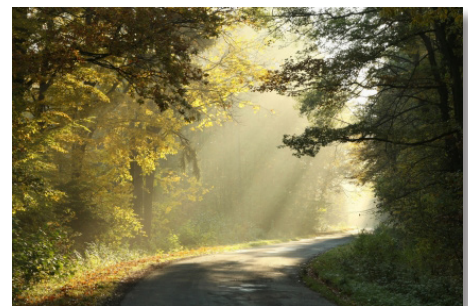
When your Guardian is facing a difficult decision, are there others you'd suggest they'd turn to for helpful guidance, encouragement, etc.?

Whether your Guardian is or isn't a family member, what can you say to them about the role you'd hope they would allow other relatives (Grandparents, Uncle/Aunts, Cousins) to play in the life of your child(ren)?



**IS THERE ANYTHING ELSE YOU WOULD LIKE TO SAY TO
EXPRESS GUIDANCE FOR YOUR GUARDIAN(S)**

“Most parents spend much more time leaving detailed instructions for a Weekend Babysitter than they do thoughtful guidance for a Guardian, who is reality is like a permanent babysitter for your child. Leaving more thoughtful guidance and information for our child’s Guardian will make their job easier the job and will greatly benefit our child(ren)”—John A. Warnick



EXERCISE:

The Last Conversation

The purpose of the Last Conversation Exercise is to give you an opportunity to reflect on all of your life experiences and the wisdom which has been handed down to you by ancestors or others you admire. If you had only limited time for a final conversation with the beneficiaries of your Purposeful Trust™ before you passed away, what would you say to them in addition to the expressions of how much you love them. What nuggets of life wisdom and your experiential reflections can you share with them?

- After you have reflected and made notes of what you might try to squeeze into such a Last Conversation, please allow your exercise partner to record your statement.
- While you are digitally recording your partner's Last Conversation, please take notes of which of these nuggets of life wisdom you would feel would be of greatest benefit to your partner's heirs and beneficiaries. Then share those thoughts with your partner after he or she has finished this ten minute Last Conversation.

