

An introduction to

WHAT MATTERS[®]



by

Cam Thornton & Rod Zeeb

5 Centerpointe Drive, Suite 400, Lake Oswego, OR 97035
503-771-2257
www.theheritageinstitute.com • E-mail: info@theheritageinstitute.com

© 2012 Heritage Institute Press

WHAT MATTERS

Cam Thornton & Rod Zeeb

Martin Forrestal had a problem, bigger by far than the twelve hundred pound moose that was banging its antlers against the side of his tent. He shut the sound of the curious moose out of his mind, and thought about the events of the past day. Last night, just a few yards from where Martin and the moose were now making one another's acquaintance, his family had been enjoying homemade blackberry cobbler topped with vanilla ice cream in the refurbished trapper's cabin where they vacationed each summer.

As they sat around the rough-hewn oak table, Martin's granddaughter Gwen described an assignment her class had been given. It sounded simple enough. Each student was to create a list called: *What Matters Most in My Life*. "The problem is," Gwen said, "we can't include any things, like toys or computers or ponies. We're supposed to just list the kind of stuff we feel in our hearts. You know, like love, or helping other people, or being good. It's hard." And then, as only an innocent child can do, Gwen dropped a question that would eventually send her granddad outside for some serious personal thinking time.

"Poppa Martin," she asked, "what matters most to you?"

To Martin's surprise, once he had given the obvious answers—the kids, family health and financial security—he found himself stumped. Gwen was right—it was a hard assignment. When you got right down to it, what did matter? He went out back and gathered an armload of seasoned oak and fir and built a fire in the woodstove. His wife and Gwen settled under down comforters on the couch with a board game and mugs of chamomile tea, and when the fire was going strong Martin unboxed the tent he'd bought in town that day. He set it up on the grassy bank of the stream about 50 yards from the cabin.

After everyone went to bed, Martin grabbed a pad of paper, a kerosene lantern and a thermos of coffee, and settled into a camp chair next to the tent. To the east, just up the mountain slope, a wilderness area stretched hundreds of miles. To the north was a thick forest of blue spruce, and to the south and west the stream cut through deep green meadows that were just now darkening to purple shadows. At the moment, though, the spectacular vista was lost on Martin.



This should be a simple question, he thought. Just two words: *what matters*. But by the time he had wrestled Gwen's question into some kind of manageable form, the moon was high and bright in the sky, the last wisps of smoke were curling from the cabin chimney, and a cool mist was forming on the surface of the creek.

Late that night Martin zipped the tent door shut and crawled into his sleeping bag. High above, a carpet of stars blanketed the sky. Next to him was the notepad, filled with his thoughts about what mattered most in his life. He was excited to share it with his family at breakfast. However, about the time first morning light was spilling over the mountain, and the friendly moose was enjoying his first taste of rip-stop nylon, Martin realized that while he had cobbled together an important list, he had no idea what to do with it. This was some of the most important thinking he had ever done. It didn't make sense to go through this exercise and then not put the list to some higher purpose on behalf of his family.

First, though, he had to deal with that moose. He sat up, shouted, and waved the yellow pad of paper back and forth outside the tent door. The moose, who wasn't enjoying the flavor of the tent all that much anyway, grudgingly obliged and splashed back across the creek. Martin went up to the cabin, made a fresh pot of coffee, and sat on the porch as the sun topped the mountain and spread across the meadow.

Now that he had identified what mattered, what was he going to do about it? His wife and grandchildren would be up soon. He wanted to have his homework ready.



From a simple beginning

Most of us have had an experience like Martin's (minus the moose, perhaps), a moment of clarity when we find ourselves confronted—and confounded—by a seemingly innocuous question that takes us right to the core of who we are. Questions like, 'do you love me,' and 'why did you make that choice,' 'what do you really want,' or 'what would you do if you were in my place,' can set us back on our heels. They make us scratch our head, and even lead us to experience some sleepless nights as our own twelve hundred pound moose crashes around in our thoughts.

Simple questions stir us the most because the things that matter most in our lives tend to be simple in nature. Values like honesty and love, patience and faith, responsibility and family unity, for example, are straightforward and uncomplicated. Most of us make the intuitive connection between the presence of those values in our world and the quality of the life that we lead. But, do we give deliberate and thoughtful consideration to the things that matter most to us in the course of our day-to-day lives?

It has been our experience that when people set out to intentionally discover and articulate what matters most to them, they begin a journey that challenges and strengthens them as individuals, and also brings their families closer together in common purpose.

Here is a simple question that helps to put this idea into perspective: do you know the first name of your mother's grandfather? Do you know what he believed in? What he stood for? Would you like your great-grandchildren to know your first name, and what it was that mattered most to you? And, do you think that those who come after you might benefit from the lessons you have learned, from the truths you have lived by, even from the mistakes you made along the way?

If you believe that generations of your family could benefit from knowing these things about you, the next question to ask yourself is, how do you plan to make that happen? For starters, you might want to make sure that all of the photos of yourself that are floating around in family albums and computer image files have your name and a short description on them! At least your great-great grandchildren will know your name.

When you begin to think about (and perhaps even write about) what has mattered most in your own life, you will launch a powerful process that can eventually become a statement to your family and to generations who will follow. This 'heritage' statement describes who you are, what you believe in, and what you stand for. It is not a will or a contract. In many ways, though, it is more important than the documents that detail and divide your material assets. The document (or video or audio file) containing your heritage statement is one from which generations of your family can draw strength, meaning, and even guidance during difficult times. It will stand as a statement of your true legacy.

How do you get started?

For all of its outward appearance of simplicity, this kind of personal assessment and discovery is no small task. In fact, as you get deeper into it, you may encounter a rogue moose or two of your own.

We suggest that if you choose to undertake this process, that you begin by 'sweeping the decks clear.'

As you think about your own life, and the life you wish for your children and generations of their children, you'll want to drill down to the unvarnished basics, and focus on issues like character, values, ideals and aspirations. Stay with your objective. Don't be concerned about creating a literary masterpiece—you are creating a list with some supporting detail, not a novel. When your list is complete (the first draft of several, no doubt) and you have identified and articulated what it is that matters most in your life, it is time to ask: what can I do with that information? How can I put it to use to help my family, now and in the future, and even to assist the organizations or causes that I support?

These are important and practical questions. We utilize a method known as the Heritage Process™ that helps people to accomplish this in an organized, professional setting. It begins with a series of Guided Discovery Process™ activities in which you are guided by a trained advisor to identify, reflect upon, and communicate the things that matter most to you. Eventually, the work you begin here can become the foundation for all of your planning. Of course, you can also begin this discovery and articulation process by yourself, without the assistance of outside advisors. There's a lot to be said for the simplicity of a comfortable chair under the stars, equipped with just with a pencil, a pad of paper, and a cup of coffee (the moose is optional). Either way, with professional guidance or on your own, the goal of this endeavor is the same: to identify and chronicle what matters most you, and then to use that information to achieve your desired results, based upon your vision, for your reasons.

Look first to the past

However you may choose to begin thinking and writing about what matters most in your life, it's a good idea to set a few guidelines for your work.

When our friend Martin sat down by the creek to begin his list, he started with three guiding principles: first, he limited himself to using just one or two words to describe each of the things that mattered most in his own life. His list took shape like this:

Honor
Family Unity
Love
Responsibility
Faith
Leadership
Philanthropy
Forgiveness
Compassion

..and so on.



Next, he decided that for each idea or value that he listed he would also add a sentence or two about where or how that value became important in his life. Who taught it to him? What was it about that person—parent, grandparent, teacher, coach,

religious leader, etc.— that had such an impact on him? Finally, Martin added a 'how-am-I-doing' category to his list. For each of the things he said mattered most in his life, he jotted down a few lines about the kind of job he had done communicating that particular value to his family and friends.

The first category, the list of things that mattered most in his life, was tough. Distinguishing between the important things in his life—like a nice home and a good health insurance plan—from things that truly mattered—like love for his family and his personal faith— was hard work. It took time. The second part, thinking back on the people in his life who taught him or modeled those values, was not just easy, he found, but also enjoyable and personally rewarding.

Connect the dots

In most cases, Martin had never consciously connected the dots between a particular value he held dear and the person from whom he had learned that value. As he thought back on his life, and on the people who had been so important to him, Martin's face often broke into a wide grin. And more than



once, a memory brought a lump to his throat, especially when he recalled how some of the 'ordinary' people in his life had triumphed over extraordinary circumstances by virtue of the values by which they had lived.

When his list was complete, columns one and two—what the values were and how he learned them—were filled with notes. But, when he came to part three of the exercise, Martin's pencil came to a grinding halt. What kind of job had he done communicating about the things that mattered most in his life to his loved ones? In fact, the more he pondered this question the more he realized he hadn't scratched the surface of the myriad ways that he could have—and should have—taken the time to deliberately and intentionally share those stories and values with those for whom he cared the most. If the proverbial eighteen-wheeler barreled down the highway and swatted him out of the game tomorrow, Martin realized, all of the lessons he had learned, all of the great stories he had in his head, in fact, most of the truly important history of his life, would be flattened and lost forever along with him.

Keeping what matters alive

It is amazing to think about the impact that a few well-chosen words on paper can have upon history. The Magna Carta, the Declaration of Independence, the Ten Commandments, and the Bill of Rights are proof positive that the length and complexity of a document have no bearing upon its significance. In fact, the opposite is often true. Consider what your home loan documents would look like piled high on your desk, for example. How does the significance of that skyscraper of paper compare to these two little words: "*I do.*" When you take upon yourself the wonderful task of creating your own 'What Matters' document, keep that in mind.

A great way to greet a new year-any time of the year

Each January, many of us set goals for things we'd like to achieve in the year ahead. We're going to lose weight, shape up our finances, spend more time with our families, maybe even get around to putting up some shelves in the garage. A new year means a new start, and for some reason, no matter how briefly it may flicker, there seems to be an extra spark of enthusiasm and commitment in our step in the first weeks of a new year.

If the list of Resolutions you made for the year looks a bit lean, consider adding one more. (Of course, it doesn't really matter if today's date is January 2nd, or August 27th or November 14th.) Find your own quiet place, away from the distractions of work and home. Take pen and pad in hand, and write two simple words in large bold letters on the top of the page:

What Matters

The rest is up to you.

*Learn more about Martin Forrestal's journey
at www.whatmattersbook.com*

The
HERITAGE INSTITUTE

5 Centerpointe Drive, Suite 400, Lake Oswego, OR 97035
503-771-2257
www.theheritageinstitute.com • E-mail: info@theheritageinstitute.com

© 2012 Heritage Institute Press