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Leaving a legacy: Toward a typology

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Abstract

This article explores the understudied phenomenon of legacy as a component of the aging experience. Against a backdrop of almost exclusive prior focus on transmission of material possessions as the primary form of legacy, the concept is critically examined in developing an expanded, theoretically and empirically grounded perspective. In-depth interviews conducted with 14 adults, ranging in age from 31 to 94 and representing diverse marital, parental and health statuses, reveal multiple dimensions of leaving a legacy in terms of content, creation and transmission. A typology of three distinct but overlapping categories of legacy was identified: biological legacy, material legacy and a legacy of values. Sub-types were identified within each category. Each participant clearly articulated and identified with at least one form of legacy and the majority expressed all three types but with varying degrees of intensity and with the legacy of values viewed as more important than other forms of legacy. The findings suggest the need and potential for developing deeper insight into a component of the aging experience that may assume particular significance toward the end of life.

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“Legacy too often probably means the giving of thing. But I think of giving of self or spirit as probably just as important. Wouldn’t you think so?” (Nellie, age 82)

What makes a life meaningful? Adopting an existentialist view, [Bauman \(1992\)](#) suggests that a successful life is a life forgetful of death and lived as meaningful and worth living. He contends that this

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is a formidable human achievement that social organization and human culture combine to make possible. Out of the innate meaninglessness of life and the struggle to create meaning, culture provides transcendence, “Culture is about expanding temporal and spatial boundaries of being, with a view to dismantling them altogether” (Bauman, 1992, p.5).

Why are these ideas important? We suggest they are important because they help delineate a human potential—the possibility of passing something on to the next generation—that may enable us to transcend discomfort with the idea of death and perhaps attain a limited form of immortality. Few of us are comfortable with the idea that we live, we die and that is it. We want to believe there is a purpose in life and that we will make a mark of some kind, perhaps only in the memories of our descendents, but a mark nonetheless. We were here; we thought; we loved; we created. This is the fertile ground from which the desire for legacy sprouts (Kane, 1996). But what is a legacy? Is the desire to make a lasting impression in some way a natural impulse? What are the underlying motivations for leaving something behind? Is this something over which we can exert some control? How does one create and transmit a legacy?

This article explores people’s understanding of, desire for, and actions in leaving a legacy. We propose that legacy creation and transmission is a multifaceted and complex phenomenon. Enmeshed in an individual’s culture, legacy offers the potential for a highly personal contribution to the future. One’s belongings, one’s memories, one’s values and even one’s body may each be transmitted to the next generation. The process of leaving something behind, a legacy, is intimately tied up with our life story and with shaping the manner in which we are to be remembered: it is a mechanism for transmitting a resilient and enduring image of what we stood for. This drive to make life meaningful and to continue existence on some level after death can manifest itself in diverse forms and behaviors ranging from the purposeful selection of belongings and artifacts to pass along to future generations, through the subconscious or conscious manipulation and nurturing of the memories others have of us, to donating our bodies to science. Employing in-depth interviews to explore manifestations of the phenomenon from a life narrative perspective, we look specifically at the meaning of leaving a legacy and suggest that this drive is something beyond merely a generative imperative.

1. Theoretical context

1.1. *Life story theory of identity*

Man is a storyteller! He lives surrounded by his and others’ myths. With them he sees everything in his life, no matter what befalls him. And he seeks to live his life as though he were telling it. (Sartre)

Creating and transmitting a legacy is one way a person concludes their life story and projects key elements of identity as expressed in this life story forward to future generations. It grounds their life within the context of a past and a future. Humans of all cultures naturally organize ideas into beginnings, middles and ends to enhance interpersonal communication and understanding (Bruner, 2002). Human experience occurs in time and space in relationship to fundamental dimensions of narrative (Heidegger, 1962; Ricoeur, 1984). Whenever it is desirous to tell “what happened” the impulse is to tell a story that recounts actions and events in some kind of temporal and spatial sequence. Stories are more than an outline of incidents; they are placed in a narrative context that gives meaning to the human experience of temporality, spatiality and personal action (Polkinghorne, 2000).

It should not be surprising that individuals use stories to transmit and to enhance personal understanding. McAdams' (1985, 1993, 1996) life story model of identity asserts that people living in modern societies provide their lives with unity and purpose by constructing internalized evolving narratives of self. He has argued persuasively that identity itself takes the form of a story, complete with setting, scenes, character, plot and theme.

The life story acts as an anchor or base from which the complexity of human interaction and feeling can be assembled into some sort of evolving coherence. The life story is not a chronology of experiences but an edited presentation of meaning and beliefs. People selectively appropriate aspects of their experiences and creatively package both past and future to integrate their life, and to make it more meaningful and more understandable both to themselves and others. The stories are continuously edited by the individual and framed by culture. Life stories reflect cultural norms and values (e.g. gender, ethnicity, class, and normative developmental timelines) (McAdams, 2001). The story places the protagonist in a cultural frame, but also differentiates them from everyone else.

It is difficult to tell a story without a moral component (Freeman, 1991). The very way a story is told implies a moral stance; one has made a narrative choice of what to tell and what to omit or forget based on the fundamental beliefs, values and ideals one holds. How does one create a satisfactory end to one's life story? Stories need convincing, coherent and logical endings to fulfill the covenant of good storytelling. It is important to distill the complex and convoluted story of our life into a coherent and concise conclusion. The creation and transmission of such a conclusion through leaving a legacy may be one mechanism for accomplishing this in a manner consistent with processes of psychological development toward the end of life.

1.2. Psychological development

McAdams (1985) stresses the value of the life story as a primary element of Erikson's (1963) adult life stages of generativity and ego integrity. The generativity versus stagnation stage highlights themes of caring for the next generation and giving something back to society. Ego integrity versus despair is the process of making sense of one's life retrospectively when the end is near. Both of these final stages entail considerable identity work during which life stories are subject to in-depth review, re-working and self editing (Butler, 1963; Chaudhury, 1999; Coleman, 1999).

Recently, scholars have taken license with Erikson's initial idea of generativity and have applied it in a much broader fashion. Since the term generativity was coined, it has been described as a biological phenomenon (reproduction), a philosophical or religious perspective (transcendence and immortality), a developmental task (normal growth), and a societal demand (source of productivity) (McAdams, 1996; McAdams, de St. Aubin, & Logan, 1993).

McAdams' theory of generativity places the motivation for generativity as emanating from both cultural demand and an inner desire. This motivation is followed by thoughts on how to act generatively, molded by concern for the next generation, belief in the need for continuation of the species and commitment to generative behavior. Outcomes are the behavior or actions of giving birth both literally and figuratively, the preservation of that which is deemed worthy and, finally, a selfless offering up of what has been created or maintained. The final feature of McAdams' generativity is narration. Generativity is seated within the larger context of life story. McAdams argues that identity development via life story creation is the major psychosocial task permeating an adult lifetime and generativity is incorporated in it as one of many important aspects (McAdams, 1996). Generativity can

be seen as one script in the life story and a significant part of how one sees oneself and would like to be seen by others.

John Kotre (1984) has written extensively on generativity and has expanded this discourse beyond childbirth and childrearing. Kotre's generativity is a desire to invest one's substance in forms of life and work that will outlive the self. He defines four manifestations of generativity: biological (reproduction), parental (nurturing), technical (teaching), and cultural (storytelling/transmitting meaning and values). Like McAdams, Kotre strived to free generativity from a fixed chronological position (Manheimer, 1995). He stressed that generativity was not exhibited at one stage of life, but throughout life. Thanks to birth control and an extended lifetime, people were making more flexible choices about when and how to be generative.

Kotre felt that while all four forms of generativity were important, cultural generativity was the site of the most generative ingenuity and often the most overlooked. Cultural generativity is the vehicle that carries the meaning of life from one generation to another (Manheimer, 1995). Cultural generativity emerges only with maturity since a sense and understanding of belonging to a culture is necessary in order to feel responsible to pass it on. A person must be able to regard her or his life as a coherent part of some larger system of meaning. Cultural generativity is motivated by a quest for this meaning through achieving an understanding of the end of life.

Kotre also reveals a more self focused form of cultural generativity than that of the communal self. Sometimes a high value is attached to outliving oneself and a form of "agentic" cultural generativity or symbolic immortality emerges. This can be exemplified by, for example, having one's name on a book or above a hospital entrance. According to Kotre this type of generativity has a focus on the self as agent and on private meanings tinged with narcissism. While this is cultural generativity, Kotre sees it as a less admirable and altruistic form (Manheimer, 1995). This is arguably one of the most important differences between generativity and legacy.

1.3. Beyond generativity to legacy

The idea of legacy is personal, flexible and more universal than generativity. Legacy removes the stigmatization of 'narcissism' applied to the drive to be remembered and to leave a mark that is expressed in both Erikson, Erikson, and Kivnick's (1986) and Kotre's (1984) conception of generativity. Selflessness is not the primary drive of legacy as it is postulated to be in generativity. The looser idea of legacy and the desire to leave something behind is a broader concept that may be ascribed cross-culturally and may be universal. We argue that all human beings leave some sort of legacy but how they accomplish this is culture specific.

Narcissism and generativity have an ambiguous relationship with one another (Rubinstein, 1994). As Alexander, Rubinstein, Goodman, and Luborsky (1991) point out, Erikson's notion of generativity is implicitly linked with altruism. One is not acting in a truly generative manner if one is interested in any sort of egocentric result such as leaving a mark or being remembered. The word narcissism, as construed by both Erikson and Kotre when discussing any self-benefit arising from generativity, is treated as a negative outcome (Kotre, 1995).

In contrast, legacy does not apply a negative connotation to wanting to be remembered and thinking of one's self. Legacy allows for varied motivations when one engages in creating something to leave behind. Rather than altruism, it is grounded in processes through which both the individual and recipients of generative or legacy-building actions may benefit.

Understanding legacy involves exploring the personal beliefs that underlie leaving something behind, be it memories, photographs, grandma's ring, children or bequests to charitable organizations. We contend that the idea of leaving something behind is intimately tied up with image maintenance and trying to control how one will be remembered (Marcoux, 2001). These are areas to explore in the context of humans' potential for couching understanding in a story format and possible developmental stages that encompass leaving something behind and coming to terms with one's life in its entirety.

Schaie and Willis (2000) recently expanded their Stage Theory Model of Adult Cognitive Development to differentiate among various groups often encapsulated within the broad rubric of 'old age.' Building on previous differentiation of old age into young old (65–74), old-old (75+) and oldest-old (85+) (Neugarten, 1982), they suggested different cognitive foci and priorities for each age period. Originally Schaie and Willis viewed old age as a stage of re-integrative cognitive work. This paralleled Erikson's (1963) idea of ego integrity. Schaie and Willis have now labeled old-old as a stage of Reintegrative Cognition. They have inserted Reorganizational Cognition to characterize the young-old who are dealing with reorganizing priorities and finances in the post-work stage of life. They have also added a final stage for the oldest-old, Legacy Creating. This stage often includes writing or revising autobiographies, putting one's effects in order, distributing prized possessions, providing an oral and material history of family pictures and heirlooms for the next generation, making funeral arrangements and perhaps undertaking a final revision of one's will.

Life stages are not clear-cut delineations of time. Legacy creation becomes a drive early in life and runs parallel to other drives and impulses; however, for the oldest-old, leaving a legacy may take on an elevated importance. Moreover, we hypothesize that rather than age per se, perceived proximity to death is a dominant factor influencing the drive for legacy creation. Schaie and Willis's revised cognitive stage theory is consistent with the contention that there is something beyond generativity in terms of leaving one's mark for future generations. Their contribution begins the process of including legacy in models of individual development and provides a context for probing deeper into the experience of legacy creation and transmission.

2. Exploring legacy

The purpose of this descriptive study was to empirically explore the experience of leaving a legacy. Using participants' life story narratives of their desire to leave behind a meaningful mark, it is possible to identify themes that extend or clarify some of the myriad theories of identity maintenance, life stage tasks, and the motivation to leave a legacy (Artinian, 1988). Through in-depth interviews and the analysis that follows, the goal is to understand more deeply the relationship among multiple variables (e.g. aging, generativity, fear of death, legacy) that determine the end of the life story.

Using a grounded theory perspective and employing theoretical sampling (Glaser & Strauss, 1967), a purposive sample of 14 participants was selected, representing a diversity of age, marital, parental, health and gender characteristics. Consistent with theoretical sampling, sample parameters changed as the study progressed. Initial participants were over the age of 80, had been or were currently married and had children. Through these interviews it became clear that it was important to talk to people of different ages and people who were not parents in order to gain a broader perspective. A third phase of the theoretical sampling was to talk to people who were facing death due to a diagnosis of cancer as

we wanted to explore nearness to death versus age in terms of their relative importance to the generation of legacy. Participants were recruited from an elder mentor program associated with the University of Kentucky doctoral program in gerontology (Victory, Ravdal, & Rowles, 1998), from the University of Kentucky Donovan Scholar program (a tuition waiver program for persons 60 and over), by word of mouth and, finally, through the University of Kentucky Markey Cancer Center Palliative Care Clinic.

Participants ranged in age from 31 to 94. There was some homogeneity in terms of education level, financial situation and ethnic background. All but two had some college and/or graduate degrees and all but one were non-Hispanic white. The participants lived near the University in a North American urban center of approximately 250,000 residents. Nellie is an 82-year-old, widowed, retired music teacher with two daughters. Glen is a 94-year-old retired college professor, married, with one adopted son. Dana is a 90-year-old widowed, retired school teacher with seven children. Ward is an 84-year-old retired minister and educator, married, with five children. Stacy is a 50-year-old nun, never married, and without children. Terry is a 58-year-old retired photographer, never married, and without children. Lisa is a 63-year-old retired college professor and artist, never married and without children. Tina is an 81-year-old retired business person, widowed with no children. Vicki is a 60-year-old married woman with four children and potentially terminal breast cancer. Mary is a 64-year-old retired teacher, married with children and a breast cancer survivor. Bonnie is a 50-year-old working African American woman, never married and with no children. Betsy is a 65-year-old retired nurse, with a second cancer diagnosis, married with three children. Mark is a 67-year-old retired businessman, married with children. Finally, Patty is a 31-year-old mother with terminal ovarian cancer.

Participants were interviewed in a place of their choosing. Each interview lasted from one to three hours and was conducted using a semi-structured format. The interview began with a discussion of what was to come. It was made clear that there was no set definition of legacy and that identifying participants' own definition of the concept was one of the objectives of the interview. Participants began by telling about their background (i.e. family, education, work) and then were asked to describe how important the idea of legacy was to them and what they thought their legacy might be. Interview probes personalized each interview depending on the participants' individual stories and beliefs about legacy. Before the interview was completed each participant was asked to think about and discuss a typology that was emerging from our analysis of previous interviews. Each participant's storytelling was audio-taped. Collected data were transcribed and stored as a paper hard copy and as a computer file.

Primary emphasis in analysis was on exploring the stories the participants created and uncovering potential themes that arose on the topic of leaving a legacy. As interviews were completed and transcribed, analysis took place concurrently. Inductive thematic content analysis procedures as used by Kaufman (1986), Rubinstein (1988, 2001), Shawler, Rowles, and High (2001), and Gubrium (1993) were employed. Coding and interpretation was an ongoing process. Each transcript was read several times and line-by-line color coded by specific content categories (e.g. inherited possessions, attitudes toward passing on values, expressions of generativity). Hand coding of transcripts facilitated more sensitive and nuanced understanding of meanings in the narrative text (Schoenberg & Rowles, 2002, p. 15). Instances pertaining to each category were incorporated into separate topical files and then aggregated into more general emergent themes. This process enabled each subsequent interview to be informed by and achieve increased focus in relation to an emerging typology. As this iterative process continued a deeper level of understanding developed (Dreyfus, 1995).

2.1. Emergent themes: toward a typology

One of the many euphemisms for dying, “passing on,” is also a term for transmission of material and non-material legacies. The task is to determine what is to be passed on to others and how one wants to be remembered. The in-depth interviews resulted in three overarching themes with respect to definition and transmission of legacy: *biological legacy*, *material legacy* and the *legacy of values*. All of the themes were apparent in each interview but varied in dominance among the participants. Each theme included a number of subcategories (see Fig. 1). The types of legacy were not mutually exclusive; rather, each type tended to overlap with others, with the predominance of themes determined by each individual’s distinctive life history, beliefs and priorities. Values were implicitly involved in each type of legacy. However, in this context, a legacy of values refers to the explicit transmission of specific values and beliefs that was discussed by the participants.

2.2. Biological legacy

Biological legacy takes three primary forms, *passing on genes*, *transmission of health conditions* and the use of one’s *body as a legacy*—for example participating in medical research or organ donation. Cultural values strongly influence the evaluation of genetic legacy. Two factors pertaining to the meaning of passing on genes through procreation figured prominently. Parents were comfortable being proud of their children and of their genetic heritage but not comfortable taking credit for their successes. This was an area where one had to be careful about being boastful. Nellie, an 82-year-old mother of two, explained that her kids were a form of genetic legacy for her but that the manifestations of this legacy became apparent more in spite of her parenting than because of it.

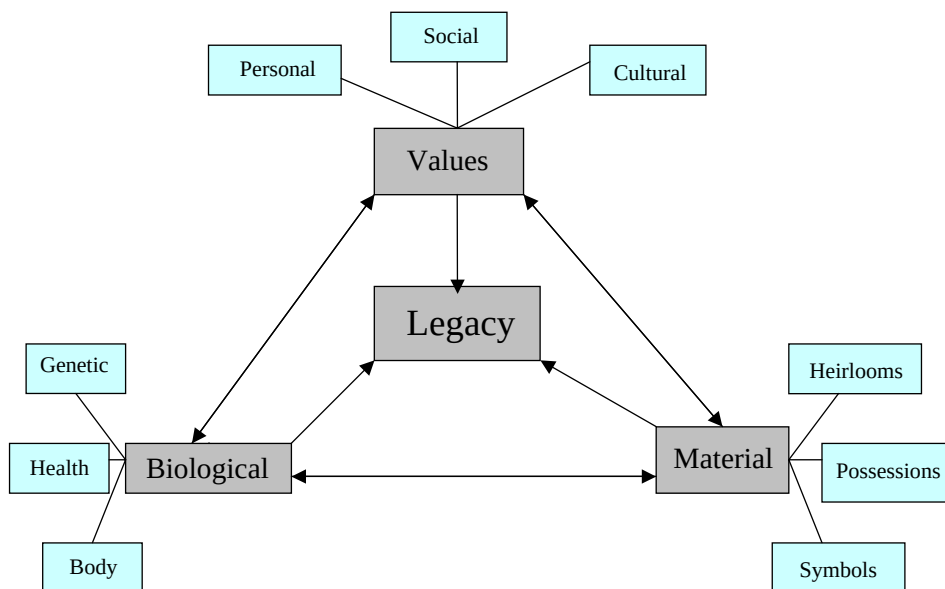


Fig. 1. Legacy typology.

“I am very proud of them. I think when a child reaches adulthood they are their own person. I think it would be wrong of me to claim them as a legacy. We helped guide them in the beginning. . .but they took the reins in their hands, they made of themselves what they are today.”

A second genetic legacy-related issue that arose in two of the interviews pertains to the complexity of modern families. In two of the families there were adoptions and in one there were grandchildren created by in vitro fertilization using donor sperm. In both of these situations the actual genetic material now in the family was not of the original bloodline. One participant had two adopted children one of whom had died. The son was the last of the family line and was dearly loved by his adoptive parents. Western culture stresses the importance of blood ties both emotionally and legally. Lines of succession and will writing laws show the importance of direct blood relation and family over “outsiders.” Glen, the 94-year-old father of an adopted child stated:

“But anyway all of this is going to be passed along. There will be some things as you can see to my son, but it is to a son that is really not of my blood. So, legacy has a different twist there really.”

Dana, a 90-year-old, had a beautiful christening gown displayed in her house. She told the story about how she was christened in it in 1913 and her seven children had been christened in it. She was unsure who she would give the gown to when she died. She wanted to give it to one of her granddaughters to whom she was extremely close, but was conflicted because this granddaughter was adopted and “is not family.” She then thought she might give it to the biological son of that same daughter, but the conflict there was that his child (her great grandchild) had been conceived via in vitro fertilization with donor sperm, so again that would result in the christening gown ending up with someone with whom she would have no genetic link.

These participants loved their adopted family members just as if they were blood relatives, but the idea of leaving “family” heirlooms to them still caused concern. Such issues are becoming more prevalent in families today as blended families, adopted families, and scientifically engineered families proliferate.

Passing on a biological legacy entailed a component beyond procreation—passing on medical conditions, a health legacy. People expressed concern with health issues that have genetic components. Diabetes and heart disease were mentioned, but nowhere was it clearer than when talking to the four women with cancer. Each mentioned the fear of passing along cancer to their children. Each hoped that their own fight with cancer would result in their family members being more educated and seeking preventive testing in order to avoid the problem or catch it early. Mary went so far as to research causes of death in her family tree and add this information to the family genealogical records. She discovered during her battle with cancer, that a number of relatives in her large extended family had been through the same experience. In order to make a positive legacy out of a negative one she documented the family health history.

As Mary puts it:

“Cancer is a very big thing. My daughter’s children will be my legacy and if I can stop it here that is an important reality. . .Cancer made me very aware of the medical legacy in my family.”

Mary had to look at where her genetic legacies came from and which one would be dominant. Her mother is 96 years old and living independently in Florida and she wonders if those genes will counteract the cancer gene she may have inherited from her father.

“I said to the doctor I wonder if I have my mother’s genes. She said, ‘Well you have half of them.’ What I meant was, yes, I knew I had half of them but I have my father’s cancer gene but do I have my mother’s longevity gene?”

A final type of biological legacy is giving one’s body as a gift. Tina, an 81-year-old widow, did not have children. She and her husband decided to donate their brains as normal controls to research studies at the Alzheimer’s Disease Research Center and their bodies to the Department of Anatomy at the University of Kentucky.

“I think the research is important and if I can help with the research by this I am happy to do it. I feel much better than being buried in the ground. Dave and I, the first semester we went back to school after the war we went to the Santa Barbara campus and lived in Santa Barbara. There was a little old Mexican gardener who parked his truck near where we lived. Very often we were coming home from class about the time he was coming in. He said he had just buried his wife that day and we said how sorry we were and he said “it’s just worms.”

Tina took this idea even further. She felt that at her age there was no sacrifice too great if it could potentially save lives.

“My thinking now, and this makes people uncomfortable when I say it, if there was some way that by giving my life now like this afternoon to save someone else’s life, I would be happy to do it. I don’t feel that there is any really good reason for me to be here. I am not depressed and I am not considering suicide. I have a good time. But if it would really save someone else, I don’t call it a sacrifice.”

Donation of one’s body may be the ultimate biological legacy.

2.3. *Material legacy*

Formally defined as the transmission of possessions, the idea of material legacy is widely documented (Belk, 1992; Csikszentmihalyi & Rocherg-Halton, 1981; Krouse, 1999; Rowles, Oswald, & Hunter, 2004). Our definition of material legacy became more complex as the interviews progressed. Material legacy does entail possessions but that category can be refined into subgroups including *heirlooms*, *possessions* and *symbols*. Heirlooms carried with them the weight and responsibility of history and quite often in-depth family stories. Passing on an heirloom seemed to carry implicit and sometimes explicit obligations for both the giver and the recipient. It was important not to break the multigenerational chain of family ownership of true heirlooms.

A second category of material legacy involved transmission of possessions that might be useful to and valued by the recipient but which did not carry the responsibility associated with receipt of an heirloom—items such as furniture, appliances and household goods. Finally, symbolic material legacy encompassed leaving societal markers. It was manifest in actions such as building a library with one’s name on it, endowing an academic chair and other public legacies that might result in a form of symbolic immortality for the donor. Passing on material items did come up in these interviews but was always couched in the context of an assertion that this was not the most important type of

legacy. As Ward, 84, stated: “Well the legacy of material things is one thing and that is not a big part of our life. . .”.

Nonetheless, all of the participants had devised methods of transmitting possessions. The primary value expressed when discussing passing along belongings was ‘fairness.’ While wills certainly provide vehicles for the exercise of power and a means of punishment, the vast majority of persons in United States culture follow rules of equality and equity (Rosenfeld, 1979). We found that it was crucial to the givers that the distribution of goods be perceived as fair by everyone involved and that harmony prevails. Ward clearly specified, “The assets will be divided equally among the five children.”

Dana had specified certain objects to be given to certain children, but more important to her was that there be harmony:

“But I have told them, I’ve said, you know if you don’t like what I have given you, don’t have an argument over it, please exchange with each other (laughter). But don’t have any arguments over it please!”

There emerged the issue of the importance of others’ valuing bequeathed heirlooms and possessions as much as the participant. There was a desire to match people to belongings to ensure that the receiver actually did want and value the item. This was well expressed by Nellie who also acknowledged that this is not always the case.

“I think that you are giving it to somebody who has that same feeling of appreciation. And it is as though you are preserving the memory of the person who gave it. It is valuable.”

And Ward explained that he was sensitive to his children and grandchildren’s behavior.

“...I keep very sensitive antennas out when the kids are around to see who pays attention and who likes what and so on.”

Two factors negatively affected the quantity of heirlooms received by the participants. The first was immigration: families who came to the United States the generation before the participants, for practical reasons, did not bring with them a lot of heirlooms. The second factor for these participants was the Great Depression. The parents of most of the participants were at the peak of the accumulative phase of their lives during the Great Depression of the 1930s. They had minimal accumulation of artifacts due to lack of resources. This idea was described by Glen:

“We were all poor...and we never had enough money to accumulate anything. Never bought anything and the only thing I have is a few photographs and a postcard marked–(name) Washington. . .No goods, just pictures and little mementos.”

Seemingly more important than family heirlooms were family stories. What people did was more important than what they had. As a result, autobiographical materials emerged from the interviews as something important to pass along through generations. Interestingly, none of the participants had inherited autobiographies from previous generations but many felt it was important to create written documentation. Possibly the extremely mobile nature of contemporary society is leading to a greater need to for attachment in some way to the places and events of our past (Relph, 1976). This perhaps explains the upsurge of autobiographical writing, concern with life histories and the current attraction of genealogical research (Chance, 1988). As one participant explained:

“Well I have written down my life story. . . I just decided I would. I just wrote it down to let the children know something about my childhood and something about my parents. . . when you are young you don’t think so much about it, but as you age, I know when I was young I never thought anything about my grandparents but as I have gotten older I wish now that I know more about them, I do.”

This group of participants, particularly those with children, is very conscious of passing along written versions of the family story. This may not have been so important in previous generations because of the strength of oral traditions transmitted within geographically proximate families, but it certainly seems to have great contemporary significance. Along with cohort effects there is the role of age; as people age, their sense of custodianship of the family story seems to become more important (Cappeliez, Lavallee, & O’Rourke, 2001).

Parental status may influence this form of legacy as well (Rubinstein, 1996). Stacy and Terry, both under the age of 60 and childless, were not concerned with writing down their life or family stories: perhaps as they age this will become more important, inasmuch as such contributions might reflect a gift to society rather than to direct descendents.

Lisa, a 63-year-old unmarried woman without children, found the transmission of her family history to be her most important legacy. Since her mother’s death she has taken classes on autobiography writing, genealogy, family history and preserving family heirlooms. Her intention is to pull together a display and donate it to the state history center. Through family paintings, writings and stories she will try to “pull all of these things together to mark my place in history. . .” She emotionally stated that this project was in honor of her mother.

“My mother was real proud of her family and until I started reading the history I didn’t really realize how much we had to be proud of. Our history is incredible.”

Her mother had instilled in her the pride of belonging to a family rich in local history and full of historical luminaries. The absence of children to whom she could pass on the stories was circumvented by directing her ancestral historical legacy to the community rather than to an individual.

Material belongings are often given before death as well as via the will. Indeed, participants were likely to have already started giving artifacts to their children and to friends (Marcoux, 2001; Morris, 1992). The motivation for this is both sentimental and practical. Participants give practical or valued items away during their lives that family and friends may need or enjoy. There is also the motivation of control and organization. Nellie, an accomplished musician, was able to accomplish both goals when giving away one of her pianos:

“I had that piano sent to me when I first came to (city). . . they packed it up and sent it across the Pacific! . . . It had seen the world and it was still in tune with itself. This friend of mine was going to get a piano anyway, and my daughter’s home will take the grand piano but it won’t take both pianos.”

By divesting herself of a cherished possession she was able to help a friend and to begin to prepare for a move into an apartment in her daughter’s house.

Some elders debate whether to try and organize things before their death to help their family members or to avoid worrying about this and let them handle this at the time of their death. The majority of participants in this study felt strongly about tidying up their own loose ends whether that meant writing

wills, making their own funeral arrangements or divesting their belongings. Sometimes this desire came from their own experience, like that of Nellie, who had to take care of a family member's belongings after her mother's death.

“What I want to do is down size so my daughter and son-in-law won't have the awful job of dealing with a great deal of stuff. . .it just broke my heart when my mother died and I went out to Australia to help my father. To go through just piles of stuff and I know things that were really valuable historically were thrown away.”

On occasion, the process of such divestiture is provoked by a particular event in an individual's life such as the need to consolidate possessions as part of a residential relocation from a single family dwelling to the more limited space of an apartment, assisted living facility or nursing home (Ekerdt, Sergeant, Dingel, & Bowen, 2004).

Ultimately, attempting to control heirlooms and possessions beyond the grave is futile. Several participants acknowledged that, in the end, family members will do with things as they see fit.

“She started painting a cup and saucer for my birthday. . .and they really are special. . .so I want to hang onto those and if they decide to get rid of them when I am gone, that's okay (laughter).”

One participant, Terry, a 58-year-old woman without children, felt differently about the transmission of material belongings. To her, this was the most important type of legacy transmission. Terry had received a substantial financial legacy from her parents and now faced the task of satisfactorily disposing of it without the benefit of children as recipients. Additionally, Terry and her sister had inherited a family business upon the death of their parents. Although she does not participate in the daily operation of the company, Terry and her sister are responsible for its stewardship. This legacy affects the livelihoods of hundreds of people resulting in a great deal of responsibility to ensure the continuation of the company after the deaths of Terry and her sister (the last of the family line). Currently her sister is uncomfortable addressing the subject. As Terry puts it:

“... I am trying to talk (sister) into thinking about it, she really doesn't like to think about any of this; it was hard on her to think about selling the company anyway. She was a little more connected to that. I mean Daddy had it and once you sell it you sort of lose all of the ties.”

In this situation, material legacy was a very important type of legacy. The considerable material plant involved, and the attendant responsibility of making sure employees were taken care of, required a great deal of work and creativity resulting in this being the foremost type of legacy for Terry.

The final subgroup of material legacy, symbols, was the least comfortable type of legacy for participants to talk about. Symbolic legacy, the transmission of the self through the creation of a lasting testament to one's existence, was found to occur either through personal effort or through external validation. Symbolic legacy through personal effort is reflected in such actions as writing a book, creating art, living a certain way, or creating a charitable annuity with one's name attached to it. These are actions taken directly by a person to ensure that their name remains in the public eye even after their death.

External validation of a symbolic legacy results when someone other than the individual establishes a means for their name to continue on. An example from this study was the creation of an endowed chair named after Glen by one of his former students. Finally, symbolic legacy may be created for a loved one by an individual. People were more comfortable talking about actions they had taken in the name of a

loved one or revered individual, such as setting up scholarships. The idea of attaching their own name was uncomfortable and participants often relegated it to something that was up to their children and grandchildren to decide on after their death.

People were reticent to express an interest in being “immortalized” in the way symbolic legacy seems to infer, particularly as a result of their own actions. Ward discussed one form of potential symbolic legacy but was quick to clarify the motivation behind it:

“Every year we give money to help two students get started to college. So I guess that’s a legacy too. And we have even put some money in our will to carry this on after I am dead. . .you mustn’t misunderstand this, we don’t do this to glorify ourselves. . .”

Symbolic legacy is most valued and socially acceptable when it comes through external validation rather than personal effort. Participants were more comfortable talking about ways they and family members had helped loved ones who had died achieve symbolic immortality. For Nellie and Terry, there was a sense that this is acceptable to do for others, but vain to do for oneself. One just had to hope that friends and relatives would provide such recognition when the time came.

2.4. *Legacy of values*

Legacy of values is defined as passing on personal values such as a belief in education, an ethos of helping people, the importance of kindness and being unique. This type of legacy may be couched in a *personal*, *social* or *cultural* context. Bequeathing values was considered the most important form of legacy transmission by all of the participants with the exception of two of the three women without children. This belief was seemingly tied into Judeo-Christian values of kindness, honesty, treating people well, and being a “good” person. The participants also wanted to pass along Western values of education, independence and uniqueness to future generations (Rokeach, 1973). The transmission of religious beliefs and training also fell into this category. Teaching strong values to one’s children is a well-accepted form of personal legacy and none of the participants had a problem stating the importance of this in words. Dana stated:

“And I have another daughter who is very interested in other people. I like to see that because I think they have seen this, seen what I do and continued this type of volunteer work to help other people.”

For participants with cancer a different sort of legacy arose. It was a sort of personal cancer legacy. One of the most important personal legacies coming out of the cancer diagnosis was creating something positive out of this negative situation. There were different ways this could be accomplished as previously mentioned—educating family members on medical legacy, bringing the family closer together and even “dying well.” The cancer diagnosis also focused participants’ attention on the importance and urgency of passing on their values and beliefs to their children.

Patty is a 31-year-old mother of two with terminal ovarian cancer. Her son is 4 and her daughter 11. Passing on her values is important to her, particularly in terms of her children.

“I started keeping a journal and I am leaving it to my kids to read. I write down everything in my journal. I write down each day what happens and how I feel and I want to let them know I am fine with this. God has a purpose for everything that is what I have always told them. I’m trying to be a role model. I want everybody to know that the cancer is with me but it is not going to ruin my life.”

Vicki is 61 years old with five adult children. Her breast cancer has been reoccurring for over 2 years but she believes she will beat it. She stressed the positive that had come out of her cancer experience.

“We live life so rapidly now and looking back I know I was as guilty as anybody else. This world is very commercial; relaxation is going to the mall and buying things. Everybody is so self-absorbed. It’s almost as though death is for everybody else. Cancer used to be that way to me, it happens to someone else. I try and tell my kids about this. My kids, each of them had their life and they were all busy. They didn’t see each other much. The one thing that has come of this is that my kids are really close now. They have all slowed down enough to focus on the family. They make time to spend with each other. If anything really good came from my getting sick it was that my kids all got close. It made me having cancer worth something.”

The value of caring for and helping others was a universal desire for these participants. This was crucially important in terms of identity management and as a role model for others, as expressed by Dana.

“And to me what you want to be remembered for is what you have done for others. That to me is the most important thing you can be remembered for, what you have done for other people and what joy you have brought to other people.”

Being a positive role model was important to all of the participants. As Tina stated,

“The only thing I think I am leaving behind is I would like to have people, now this is going to sound conceited, but think that I was a pretty nice person and an interesting person. And perhaps a person who they might see as a role model.”

Other participants included such lessons as working hard for what one wanted, never hurting or hating anyone and family harmony. Here we begin to overlap with social values.

A valuing of education proved to be a particularly strong social value passed from one generation to another. Most of the participants had well-educated children and were proud of these achievements. Four participants were leaving financial legacies for different educational institutions to help non-family members achieve in this arena as well, although Dana made perfectly clear that education does not supercede kindness in the relative importance of legacies.

“...one son is a lawyer, one a PhD and the others, all except one, have a masters. I expected this of them and they all worked hard to get it. . . It is a value, that is right, but it is not the most important value. . . You can have a PhD and be a son of a gun as far as I am concerned or you can not have an education and be a fine, fine person.”

Even without children, Bonnie feels that passing along the value of education is crucial.

“I’m trying to have a positive influence on them. Like my older nephew, Chris, he’s 13 years old and I’m trying to explain to Chris the importance of keeping his grades up and pursuing college.”

Education went beyond traditional formal standards and expectations. It encompassed the idea of life-long learning. Ward was proud of his wife for getting her master’s degree after she turned 60. Since receiving the degree, she had embarked on a completely new career and he has become actively involved in this career since his retirement. The idea of staying vital and involved resonated throughout the interviews whether through volunteer work, schooling or perhaps travel. This was another social value that was considered a strong one to pass on to others.

Finally all of the participants with children showed great pride in the values of their children and, in particular, their individuality, as illustrated by Vicki:

“I don’t have any money, I won’t leave any money, but I tried to teach my kids never to feel better than someone and to never see differences in people. Don’t be prejudiced. To me that was really important and my kids, every one of them, are really good. They never meet a stranger; they never meet someone less than them. They aren’t a bit prejudiced and that was really important to me.”

Ward commented,

“One of the things that is really important to me is for my children to be independent, and think for themselves. I am happy to say most of them are. They are individuals...they are not rubber stamped and that is good.”

Stacy, one of two participants without children who placed their greatest emphasis on a legacy of values, did so in great part due to her calling and career as a nun. For her, legacy transmission was focused not on the individual but at the community level. Her work is aimed at social justice and cross-cultural understanding, with being a “good person” almost a given. She spoke about her connection to her family as expressed to her newborn niece and the importance of making the world a better place:

“I remember sitting there and holding her. . .and thinking I really wanted to keep on trying to make the world as good as I could for her and for children like her. . .That kind of thing in terms of my own family as well as looking at the bigger call from a religious tradition perspective, to make the world be what it can be and not let it fall into rack and ruin.”

And here we merge into consideration of cultural values.

A strong example of transmission of cultural values came from Betsy and Mark, a married couple of the Jewish faith. Betsy and Mark considered that their faith and culture was one of the most important values they could pass on to their children and grandchildren. Betsy quoted the Jewish figure Hillel as the epitome of the Jewish belief: “If I am not for myself alone who will be for me, but if I am not for others of what good am I?” Then she added, “See that’s the legacy and the big picture.” Mark placed Judaism squarely in the center of his family’s identity. “The legacy of the family, who they were, what they did, is the most important thing.” His father was a renowned figure in his Jewish faith community.

“My father’s main thing in life was the Jewish people. He was a national figure in Judaism during his lifetime. I think a lot of that had a large impact on me. I am now deeply involved in the Jewish community activities.”

Legacy of values had the most resonance with the majority of the participants. While values are implicit in all forms of legacy, we found that explicitly passing along personal, social and cultural values was seen as an important part of parenting, of one’s long-term social responsibility to the community, and of one’s responsibility to transmit one’s cultural identity to the next generation.

3. Legacy priorities

The previous descriptions have identified an array of different manifestations of legacy. The types of legacy are not mutually exclusive. For example, there can be overlap between biological legacy and a

legacy of values when discussing health issues or when contemplating donating organs or participating in research. Lisa showed how material legacy and legacy of values overlapped. Her primary motivation was to pass along the family history and beliefs, but she was using many material heirlooms as illustrations for the story she was creating.

Table 1 summarizes our assessment of the degree to which each of the 14 participants expressed different elements of the typology. Each marked box reflects an overt mention of the types of legacy during the interviews. This table does not address the level of importance each participant assigned to each type of legacy they intended to leave. Conflicting strongly with the prevalent view that legacy is primarily a matter of providing a biological inheritance or bequeathing material possessions, the strong consensus of the participants' responses was that legacies of values were the most important they could provide. The participants considered that it was personally rewarding, socially desirable, and culturally appropriate to strive to pass along strong values. This form of legacy appeared to be less important to two of the individual's without children. Neither discussed the transmission of values. As Lisa, a teacher, noted in response to a question about the values that she might instill through her instruction:

"I never think about that in terms of legacy. Certainly I want the children to be good and have good values and make the right decisions and all that sort of thing. But as far as public school teaching is concerned that is not as strong with me. . ."

Without the obligation of childrearing, both Terry and Lisa had developed different preferred methods of leaving a legacy. While values implicitly pervaded their methods of transmission, these were not explicitly expressed. Terry had been left a considerable estate by her parents and the distribution of belongings, a family company and money was foremost in her mind at this point in time. Her age, 58,

Table 1
Transmission of Legacy

		Biological			Material			Values			Total
		Genetic	Health	Body	Heirlooms	Possessions	Symbols	Personal	Social	Cultural	
Parents	Nellie-82	×			×			×	×		4
	Glen-94					×	×	×	×		4
	Dana-90	×			×			×	×		4
	Ward-84	×				×	×	×	×		5
	Mark-67	×	×		×	×		×	×	×	7
	Betsy-65 ^a	×	×		×	×		×	×	×	7
	Vicki-60 ^a	×	×			×		×	×		5
	Mary-64 ^a	×	×		×	×		×	×		6
	Patty-31 ^a	×	×	×		×	×	×	×		7
Childless	Bonnie-50					×		×	×	×	4
	Terry-58					×	×				2
	Lisa-63				×	×	×				3
	Tina-81			×		×		×	×		4
	Stacy-50							×	×	×	3
		8	5	2	6	11	5	12	12	4	

^a Cancer diagnosis.

may influence this choice as well. Perhaps as she ages an explicit legacy of values will become more important, but at this stage in her life it was of almost no interest to her. Lisa had been left a rich family history replete with portraits, letters and other historical documents. Her ancestors were quite well known and she felt strongly about preserving and passing along this history for the benefit of her community and her family but did not discuss a legacy of values.

Somewhat surprisingly, material legacy was considered to be the least important legacy for this sample. However, all but three of the participants had made some sort of provisions for disbursing their personal possessions. To some this was more important than others. For example, Vicki and Mary in their wills had specified who would receive each heirloom or cherished possession. The majority had merely addressed their possessions in their wills in order to tidy up their estates and to help their families by having everything organized. Every participant except for Terry stressed that belongings were not the most important part of their legacies. As Bonnie puts it,

“I told my sister, I said if something were to happen to me, it’s up to you to decide what to do with it. Material things, you know, it’s nice to have but it’s not the most important thing, at least to me.”

Material goods that lead to a lasting symbolic legacy were uncovered in five of the interviews. Glen had been externally validated by having a former student of his create an endowed chair at the university where he used to teach.

“That man was a very, very poor man and wanted to go to school and started to school and didn’t have any money so he joined my debate team and said he had to quit, and I said, ‘No, why do you have to quit?’ He said, ‘Because I don’t have any money.’ And I said, ‘Live with us.’ So he moved in with us. And, uh, he has a very interesting story but anyway, he became a Baptist minister then retired and went to Merrill Lynch. Ultimately he was a Vice President at Merrill Lynch and decided one day that he ought to do something in my honor because of what we had done for him. So he gave \$50,000 to this fund and asked some other people to join him and so forth. They have raised over \$400,000.”

Lisa was attempting to create a lasting legacy for her family name through creation of a family collection for the local museum. The other three participants in this category had attained a sort of symbolic legacy through publishing written documents. But, together with the remainder of the participants, they strongly asserted that this was the least important type of legacy.

Under biological legacy some not unexpected but strong distinctions emerged. Those participants with cancer were very aware and concerned with passing on a genetic and health legacy. They were fearful of children inheriting their cancer genes. There was a desire to transmit a health behavior legacy emphasizing the importance of preventive care and healthy living habits. Their main hope was that if the children did indeed inherit a propensity for cancer they would be sensitized to the problem and it would be detected early through preventive care doctors’ visits.

There was a complete lack of interest in this area of legacy for women without children. Although their families may have had histories of cancer, diabetes or heart disease, aside from a slight concern for themselves and some attempts at following a healthy lifestyle, there was an absence of concern for relatives. Nieces and nephews health was considered to be more under the purview of their parents. These women did not voluntarily express concern in this area and when prompted did not feel that this type of legacy was important to them.

4. Perspective on legacy

Values infiltrate all aspects of legacy. Everything we pass along is implicitly influenced by personal values. Acknowledging this, the explicit expression of a legacy of values is still by far the most important form of legacy to all but two of our participants. One of the first comments offered by the majority of participants was that one's primary legacy is how one will be remembered. Everyone wanted to be remembered positively, to pass along beliefs, values and ideals they felt made them strong and contributed to positive aspects of their identity. This sentiment was expressed regardless of parental status. All but two of those without children had other targets for transmitting their values. Nieces, nephews, students and community groups could act as surrogates for children.

Participants with cancer became especially concerned with their legacy of values. Having forewarning of one's potential death tended to reduce concern with material things; it seemed to facilitate a more intense focus on the meaning of one's life. At the age of 31, for Patty a cancer diagnosis had elevated leaving a legacy to her children to an imperative.

"I never thought about it until I did get the cancer, I would have to say cancer had the biggest role. . . . I write about my cancer and everything. I just want everybody to know that the cancer is with me but it is not going to ruin my life. I am taking control over my life not the cancer."

There is a need to create something positive out of the illness. All of the participants with cancer described ways in which something good had come out of their diagnosis that they might bequeath as a legacy through becoming role models of positive values, personal strength and wisdom to friends and family (Carver & Scheier, 2002).

In order to conclude a life story there seems to be a need to create a moral of the story. One of the most important things was to come up with a nugget of wisdom or insight—an expression of the essence of the self created over a lifetime that could be passed along to future generations. This nugget might be a way of illustrating the meaning one had created in one's life (Baumeister & Vohs, 2002). A sense of wisdom and spiritual connection were imbued in passing on values developed over a lifetime (Baltes, Gluck, & Kunzman, 2002). We want to leave something positive behind and exhibit an optimism that allows us to find something positive even in the darkest of situations. Gratitude for the opportunity of life and connection to and love for humanity as a whole motivates leaving a positive legacy (Emmons & Shelton, 2002).

It is important to conclude with some caveats and observations on potential future research on legacy. Our typology is based on study, albeit in some depth, of 14 individuals representing a limited segment of the population. Future studies can usefully probe each type of legacy in more depth. Comparative studies employing larger samples are warranted. There is a need for deeper probing of variations in expressions of legacy manifest by individuals from different socio-economic and ethnic groups. There is a need to investigate gender differences in legacy: for example, are men more at ease with the idea of symbolic legacy than women? Cohort differences in legacy merit investigation: to what extent do different generations attribute different levels of importance to one type of legacy over another? Parental status may be critical determinant of legacy creation. For example, as women have more and more roles available to them, the role of mother becomes increasingly one of choice. As the societal atmosphere becomes ever more accepting of the decision to forego motherhood, the issue of legacy for women who do not fill the role of mother and have

no children to provide with bequests becomes a fertile area for further exploration. It is also important to expand our conception of legacy to embrace the recipients of legacy. We have approached the topic from the perspective of the individual creating the legacy but what about legatees? To what extent is the meaning and value of legacy defined by its acknowledgement and acceptance by the receiver? Finally, and perhaps most intriguing, there is a need for longitudinal studies of legacy that explore the concept as it evolves over the life course and to provide insight on the increasing concern with one's legacy that appears to become a key issue during life threatening illness and during the terminal phases of a life.

Ultimately, and from an existential point of view, our concern with and need for a legacy emerges from a basic and universal confusion over death and its meaning. As Bauman (1992) describes this, humanity has a need for some sense of purpose and a sense of belonging to something bigger than the self. Inability to comprehend and understand nothingness leads to attempts to achieve post-death image management. We want to be remembered fondly and we want to leave a mark when we go.

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