

FAMILY FINANCIAL WORKSHOP

We have found that families who talk about money may do better financially over the long term.

We developed this worksheet to help you explore

We developed this worksheet to help you explore your financial values, concerns, and priorities and to help you communicate them to your family.

Please use this workbook to introduce financial topics and have important conversations about wealth with your children, grandchildren, and loved ones.

DEFINING WHAT WEALTH MEANS TO YOU

	What does wealth represent
t	o you as a person?
	How do you feel about
S	aving money?
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١	What is worth saving for?
7	Albert are your feelings about
١	What are your feelings about pending money?
J	pending money.
-	
-	
-	
F	How do you feel about going into
c	lebt to buy things?
	, 0
ŀ	How has your income
i	nfluenced your life?
	171
	What are your concerns bout the future?
d	bout the future:
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7	What's the story of your
\ f	What's the story of your
\ f	What's the story of your amily's wealth?
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ſ	What's the story of your amily's wealth?

STORIES ABOUT WEALTH



Describe a financial mistake or important lesson you've learned in life.	Describe a time that you felt fortunate.
Describe a time that persistence and effort paid off.	Describe a time that you didn't have enough money.

CONNECTING WITH YOUR FAMILY

What do you wish you had known about wealth at your child's age?	What worries do you have about your parents or grandparents?		
What activities would you like to do as a	family?		
☐ Sharing philanthropic work☐ Sharing family stories☐ Going through photo albums	 □ Writing down the family history □ Talking about the family legacy □ Discussing personal finance goals and priorities 		

MISSION STATEMENT ACTIVITY FAMILY

A corporate mission statement is designed to build a shared identity and vision within a company and guide its activities. A family mission statement has a very similar purpose—to help you live intentionally and consciously embrace your values.

STEP 2:

CALL A FAMILY MEETING Bring your family together	STEP 2: WRITE DOWN YOUR	VALUES of the family an opportunity	DISCUSS YOUR VALUES AND CHOOSE FEWER THAN 10 TO CONSTRUCT
Bring your family together for a few hours over a meal or during a special day on a family vacation. The key is to make it special and separate from a regular family meeting. Focus on being positive, open, and willing to let go of perfection.	to write down the valimportant to the fam	lues that he or she <mark>feel</mark> s are	After everyone has written down the values that matter to them, discuss them as a family. The most important thing is to listen carefully to every member of the family no matter how young.
STEP 4: CONSTRUCT A MISSION STATENUSING SHARED VALUES Sample Family Mission Statemen. "To live a life full of love, compassion that supports our community, enrico our character, and helps us grow clouw when the supports our community, enrico our character, and helps us grow clow when the love learning family centered, and we love learning and seeking new et together as a team by thinking, active a family." FAMILY MISSION STATEMENT DESTRUCTION OF THE PROPERTY DESTRUCTION O	ts: n, and adventure in a way hes our faith, strengthens ser as a family." d honest with each other. xperiences. We grow ng, and working as	STEP 5: REFINE YOUR MISSION STATEMENT FAMILY MISSION STATEMENT DRAFT 2:	
What worries do you have about your children or grandchildren?	How would you your loved ones	like to be approached by about financial topics?	What are two things you want to learn about your parents or grandparents?
What are two things you want to l about your children or grandchild	earn What legacy do y ren?	you want to leave as a family?	

AHA! MOMENTS

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Use this sheet to jot down notes and ideas that occur during the presentation.				

If you have questions about how to connect with your family about wealth, please contact our office. We would be delighted to offer our professional perspective and insight.

