



The following is a quick assessment to determine what areas are most important to you and your family and where you feel you currently are in each of these areas. This will help you to understand your priorities as it relates to the different aspects of WEALTH.

Rate Order of Importance

(5 = Very Important; 1 = Don't Care)

Family Achievement Rating

(5 = Mastered; 1 = Haven't Started)

5 4 3 2 1	Our family communicates well, and is effective at discussing sensitive topics.	5 4 3 2 1
5 4 3 2 1	Each family member is confident they have a voice within our family and permission to assert themselves.	5 4 3 2 1
5 4 3 2 1	I have identified my values that guide my purpose, integrated them into my life and share them with the people who are important to me.	5 4 3 2 1
5 4 3 2 1	Our family meets regularly for family fun, growth & development.	5 4 3 2 1
5 4 3 2 1	We have developed a process for our family to make decisions together.	5 4 3 2 1
5 4 3 2 1	We have a structure in place to keep my children, grandchildren and great-grandchildren connected and unified.	5 4 3 2 1
5 4 3 2 1	Our advisors work in collaboration on behalf of our family.	5 4 3 2 1
5 4 3 2 1	Our family actively mentors future generations by preparing them for the emotional as well as the financial wealth they will receive.	5 4 3 2 1
5 4 3 2 1	We have a plan for a genuine transfer of leadership.	5 4 3 2 1
5 4 3 2 1	Our family has captured our story and life lessons for the benefit of future generations.	5 4 3 2 1
5 4 3 2 1	We have created opportunities for our next generations to develop and utilize collaborative skills.	5 4 3 2 1
5 4 3 2 1	We have identified the best role for each of our family members that leverage their unique talents/gifts.	5 4 3 2 1
5 4 3 2 1	We have defined what matters to our family.	5 4 3 2 1
5 4 3 2 1	Our family has a clear understanding of the causes and organizations that we would like to support.	5 4 3 2 1

Are you confident that your family is prepared for the financial and emotional responsibility of the family legacy? Yes / No

Do you feel it is your duty to prepare them for these responsibilities? Yes / No

Signature _____ Date _____