

Family Summit

Values and Legacy Workbook



Prepared for: _____

Date: _____

Congratulations!

Your family summit is an opportunity to keep family members connected and engaged with your family business and the business of your family. This event should be equal parts family, fun, business, philanthropy and education. It should include something for everyone, and it demands interaction among family members of all ages. A family summit is terrific opportunity to communicate what the family needs as it relates to your legacy and the family.

Pre-Summit Preparation

Please come prepared to discuss your answers to the following questions:

» What are some goals you have for the Summit?

1)

2)

3)

4)

5)

» What would be considered a successful outcome of the Summit?

» Do you want other professionals there?

» What do you want to disclose?

» Share about your kids and family:

» What would you want the rest of the family to know if you were to pass away tomorrow?

» What are your biggest concerns?

» How deep do you want to go about estate transfer, etc.?

» What is off-limits?

» Would it be productive/not productive for your kids to send me any questions ahead of time?



VALUES & LEGACY

Family Values About Wealth

» What are the principles that guide your family's life/choices/decisions?

» What values are you instilling and passing on to your family, or what values do you WANT to instill and pass on to your family?

» What lessons have you learned in life that you want to pass on to future generations?



» What are some of your favorite quotes, bible verses, proverbs, or other pieces of wisdom?

» What are the things – traditions, skills, passions, values, character traits – that you want to intentionally teach your children and grandchildren?



» What advice would you give to a young person growing up today?

» How do you want your wealth to impact your family members and the causes you love and support?

» What family recipes do you want to make sure to leave to your children and grandchildren?

» What family photos do you want to make sure to leave to your children and grandchildren?


