GENERATIONAL WEALTH

MISSION STATEMENT GUIDE

RWA WEALTH PARTNERS

This worksheet is designed to engage every family member in creating a mission statement that reflects your shared values, goals and identity.

SHARED INTERESTS AND ACTIVITIES:

List activities that bring joy to our family. What are the things we love doing together?
Identify any unique characteristics or interests that define us as a family.

CHERISHED MEMORIES:

Reflect on some of our most treasured family memories. Why are these memories special to us?

AREAS FOR IMPROVEMENT:

Discuss aspects of our family life that we could enhance. How can we grow or change for the better?

FINANCIAL EDUCATION AND RESPONSIBILITY:

How can we promote financial literacy within our family? Think about ways to educate younger members about wealth management.

PHILANTHROPY AND GIVING BACK:

How do we want to approach philanthropy as a family? Discuss the causes that resonate with us and how we can contribute.

LEGACY AND SUCCESSION PLANNING:

What legacy do we want our wealth to leave? Discuss how our wealth can impact future generations and our plans for succession.

BALANCING WEALTH WITH PERSONAL ASPIRATIONS:

How do we balance the management of our family wealth with our individual and collective aspirations? This can include personal development, career goals and family objectives.

OUR FAMILY MISSION:

This section is where we articulate our family's guiding principles and aspirations. It's a statement that captures what we stand for, how we intend to manage and use our wealth, and what legacy we aim to leave behind. It reflects our collective values and our commitments to each other and to the broader community. It serves as a blueprint for our family's decisions and actions regarding our wealth and social responsibilities.