GENERATIONAL WEALTH

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WEALTH VISION WORKSHEET



WEALTH IS HUMAN."

Self-reflection

WHAT DOES WEALTH MEAN TO YOU?
(Examples: Security, freedom, opportunity for education, ability to give back)
HOW DOES WEALTH ALIGN WITH YOUR LIFE VALUES?
(Examples: Supporting family, contributing to community, pursuing personal growth)
Family impact
HOW DO YOU WANT YOUR WEALTH TO INFLUENCE YOUR CHILDREN'S AND GRANDCHILDREN'S LIVES?
(Examples: Fund their education, enable travel experiences, teach philanthropy)
HOW WILL YOU AVOID NEGATIVE EFFECTS LIKE ENTITLEMENT?
(Examples: Setting spending limits, encouraging part-time jobs, volunteering as a family)
Partner and family alignment
WHAT FINANCIAL GOALS DO YOU AND YOUR PARTNER SHARE?
(Examples: Saving for retirement, buying vacation properties, traveling, funding education)
WHERE DO YOU HAVE DIFFERENT VIEWS, AND HOW CAN YOU ADDRESS THEM?
(Examples: Differing views on investments, charitable giving, or savings strategies)



Aspirations

(Examples: Community leadership, mastering new skills, achieving personal goals)
HOW CAN WEALTH SUPPORT THESE BROADER ASPIRATIONS?
(Examples: Funding community projects, enrolling in courses, traveling for cultural exposure)
Principle development
WHAT ARE YOUR FAMILY'S CORE PRINCIPLES REGARDING WEALTH?

Example principles

"We believe in using our wealth to not only ensure our family's comfort and security but also to contribute positively to our community through charitable acts and support for local initiatives."

"Our family views wealth as a tool for creating opportunities for personal and professional growth, and we commit to investing in education and experiences that enrich our lives and broaden our perspectives."