

GENERATIONAL WEALTH  
**WEALTH VISION WORKSHEET**



**Self-reflection**

**WHAT DOES WEALTH MEAN TO YOU?**

(Examples: Security, freedom, opportunity for education, ability to give back)

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**HOW DOES WEALTH ALIGN WITH YOUR LIFE VALUES?**

(Examples: Supporting family, contributing to community, pursuing personal growth)

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**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)

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**HOW WILL YOU AVOID NEGATIVE EFFECTS LIKE ENTITLEMENT?**

(Examples: Setting spending limits, encouraging part-time jobs, volunteering as a family)

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**Partner and family alignment**

**WHAT FINANCIAL GOALS DO YOU AND YOUR PARTNER SHARE?**

(Examples: Saving for retirement, buying vacation properties, traveling, funding education)

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**WHERE DO YOU HAVE DIFFERENT VIEWS, AND HOW CAN YOU ADDRESS THEM?**

(Examples: Differing views on investments, charitable giving, or savings strategies)

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