

FAMILY FINANCIAL WORKSHOP



We have found that families who talk about money may do better financially over the long term.

We developed this worksheet to help you explore your financial values, concerns, and priorities and to help you communicate them to your family.

Please use this workbook to introduce financial topics and have important conversations about wealth with your children, grandchildren, and loved ones.

DEFINING WHAT WEALTH MEANS TO YOU

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ow do you feel abo ving money?	out
ing money:	
hat is worth savin	g for?
hat are your fashir	age about
hat are your feelir ending money?	igo abbut
8	
ow do you feel abo	out going into
bt to buy things?	
ow has your incor	ne
luenced your life	?
hat are your conc	erns
out the future?	CITIO
hat's the story of y	our
nily's wealth?	

STORIES ABOUT WEALTH



Describe a financial mistake or important lesson you've learned in life.	Describe a time that you felt fortunate.
Describe a time that persistence and effort paid off.	Describe a time that you didn't have enough money.

CONNECTING WITH YOUR FAMILY

What do you wish you had known about wealth at your child's age?	What worries do you have about your parents or grandparents?
What activities would you like to do as	a family?
 ☐ Sharing philanthropic work ☐ Sharing family stories ☐ Going through photo albums 	 □ Writing down the family history □ Talking about the family legacy □ Discussing personal finance goals and priorities

FAMILY MISSION STATEMENT ACTIVITY

A corporate mission statement is designed to build a shared identity and vision within a company and guide its activities. A family mission statement has a very similar purpose—to help you live intentionally and consciously embrace your values.

STEP 2:

CALL A FAMILY MEETING	WRITE DOWN YOUR \	/ALUES	DISCUSS YOUR VALUES AND CHOOSE
Bring your family <mark>tog</mark> ether for a few hours over a meal or during a specia <mark>l da</mark> y on a	Give every member of to write down the val important to the fam:	of the family an opportunity ues that he or she feels are ily.	FEWER THAN 10 TO CONSTRUCT YOUR MISSION STATEMENT
family vacation. The key is to make it special and separate from a regular family meeting. Focus on being positive, open, and willing to let go of perfection.	☐ Fun ☐ ☐ ☐ ☐ ☐ H☐ Adventure ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	Creativity Hard Work Discipline Humor Honesty Community Cindness Integrity Compassion Service	After everyone has written down the values that matter to them, discuss them as a family. The most important thing is to listen carefully to every member of the family no matter how young.
STEP 4:		STEP 5:	Even children want to know that their contribution matters.
CONSTRUCT A MISSION STATEN USING SHARED VALUES	MENT	REFINE YOUR MISSION STATEMENT	
Sample Family Mission Statemen "To live a life full of love, compassion that supports our community, enrice our character, and helps us grow cla	on, and <mark>adventure i</mark> n a way ches our faith, <mark>stre</mark> ngthens	FAMILY MISSION STATEMENT DRAFT 2:	STEP 6: REVIEW REGULARLY
"We are loving, family centered, an We love learning and seeking new e together as a team by thinking, acti a family."	experiences. We grow		Your mission statement should be a living document that inspires your day-to-day life.
FAMILY MISSION STATEMENT D	RAFT 1:		Keep copies of it on your fridge, in your office, and in your children's rooms so that you can refer to it often.
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What worries do you have about your children or grandchildren?	How would you your loved ones	like to be approached by about financial topics?	What are two things you want to learn about your parents or grandparents?
What are two things you want to labout your children or grandchild	learn What legacy do y	you want to leave as a family?	

AHA! MOMENTS Use this sheet to jot down notes and ideas that occur during the presentation.

If you have questions about how to connect with your family about wealth, please contact our office. We would be delighted to offer our professional perspective and insight.



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