

## The Family Conversation

Statement	Yes/No
1. We have a clear idea of our values, intent, and goals for our wealth (successful families transfer wealth and values).	
2. We have shared our values, intent and goals with our family.	
3. We involve our family (or are starting to involve) in the most important decisions we make (as appropriate).	
4. We are involving heirs in the management of family assets (transitioning).	
5. Heirs, executors, successor trustees and others are aware of where our documents are.	
6. At least annually we review with family, heirs and appropriate professionals where our assets are and any changes to those assets.	
7. Our family all agrees that family unity is very important. If not, we are seeking resources to resolve.	
8. Our family/We at least annually review our “family plan” to see if any changes need to be made, decide if anything needs to be done now, list any changes to professionals involved, and update family members, heirs, and trustees.	
9. If we have included philanthropic wishes we meet separately at least annually to discuss and decide on our charitable giving for both now and the future. Involving and giving a voice to all members.	
10. We continue to work on communication and inclusion within the family and are committed to addressing and discussing issues as they arise.	



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