

Planning your family meeting

Family advisory and Philanthropy services

If you were to have a family meeting with your family...

Why

Reasons I want to have a family meeting are...
(Check as many as apply)

- | | |
|--|--|
| <input type="checkbox"/> Envision our family in 10, 20 or 30 years? | <input type="checkbox"/> Enhance trust among family members |
| <input type="checkbox"/> Discuss topics related to money, philanthropy, and legacy | <input type="checkbox"/> Leadership and accountability for actions of family members |
| <input type="checkbox"/> Explore values and purpose | <input type="checkbox"/> Connect multiple generation |
| <input type="checkbox"/> Begin or continue discussions related to wealth | <input type="checkbox"/> Educate and mentor family members |
| <input type="checkbox"/> Begin or continue discussions related to philanthropy | <input type="checkbox"/> Share news, concerns, opportunities and challenges |
| <input type="checkbox"/> Engage our loved ones in a wealth conversation | <input type="checkbox"/> Set standards, expectations and traditions of annual gatherings |
| <input type="checkbox"/> Offer a venue for family members to learn from each other | <input type="checkbox"/> Discuss family enterprise |
| <input type="checkbox"/> Make decisions together | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Foster effective communication | |

What

Goals for my family meeting include...

- What do the wealth holders want to discuss?
-

- What do the inheritors want to discuss?
-

- What are their objectives?
-

Some of the potential agenda topics I would like to explore are...
(Check as many as apply)

- | | |
|---|--|
| <input type="checkbox"/> Family history and storytelling | <input type="checkbox"/> Financial education |
| <input type="checkbox"/> Personal updates | <input type="checkbox"/> Estate planning education |
| <input type="checkbox"/> Values and purpose clarification | <input type="checkbox"/> Business updates |
| <input type="checkbox"/> Family mission statement creation | <input type="checkbox"/> Investment updates |
| <input type="checkbox"/> Charitable giving and philanthropy strategy and implementation | <input type="checkbox"/> Family governance |
| <input type="checkbox"/> Communication styles assessment | <input type="checkbox"/> Goal setting |
| | <input type="checkbox"/> Other _____ |

Topics that are off-limits for a family meeting include...

Who

People I want to be present are...

Parents _____

Children _____

Married-ins (spouses, in-laws) _____

Grandchildren _____

Facilitator _____

Advisors _____

When

A time when I may want to hold a family meeting are...

January

April

July

October

February

May

August

November

March

June

September

December

Where

A place where I may want to have a family meeting is...

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