Morgan Stanley

WEALTH MANAGEMENT

Bunker Medbery
Senior Vice President
Sr Portfolio Management Director
Wealth Advisor
NMLS #1297986

3500 Colonnade Parkway
Suite 200
Birmingham, AL 35243

direct +1 205 969 7006
sms/text +1 205 448 6559

bunker.medbery@morganstanley.com

Talking about money with family members can feel taboo!

What is the best way to communicate your values to the next generation? We believe it starts with a series of conversations about your experiences and beliefs.

Here is a list of questions to help you get started. We think they will be fun, easy, and revealing. Try them, and then let us know how it went!

- What was your first job?
- What challenges come with having money?
- What mistakes have you made with money?
- If someone gave you $100,000, what would you do with it?
- What responsibility do we have to those in need?
- What does it mean to be rich?
- What is the most important thing you have learned about money?
- When is it OK to borrow money?
- What would you like to learn to be a better money manager?
- Does giving make you rich?
- What did your parents teach you about money?
- Should children give to charity?
- Is it best to save, spend, or give?
- If you needed some extra money, what would you do?
- What do you enjoy buying that you don’t need?
- What is the most extravagant thing you have ever bought?
- If you could donate $1,000,000 to charity, which would you choose?
- Is giving your time more valuable than giving your money?
- What would you do if you were one of the richest people in the world?
- If you had to quit your job to chase a dream, what would it be?
- What does generosity mean to you?

Darlene Beck
Sr Registered Client Service Associate
direct +1 205 969 7059
darlene.beck@morganstanley.com

- What was the first thing you saved money for?
- How did your family's financial status affect you as you were growing up?
- Is the way your family makes purchasing decisions effective and fair?
- What is the best investment you have ever made?

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