Roadmap for Engagement

Pick your topic of focus. Work with your team of advisors on execution. We've included the tools and steps to get started.

Estate Planning:

a. Grantor's Triangle
b. List your assets and liabilities. Keep it simple.
c. Balance sheet without your balances
d. Estate Planning Checklist
e. Estate Planning Flow Chart

Values Exercise:

a. Identify your values.
b. Have spouse identify values.
c. Schedule time to hear each other's answers.
d. Identify your common values.

Your Story:

a. Framework for telling your story.
b. Identify your heroes.
c. Wisdom behind the wealth.
d. Draft a legacy letter to your children.

Create a two-way conversation with your rising generation:

a. Define the roles and responsibilities of those involved in the Grantor's Triangle.
b. Schedule a meeting with all key players of Grantor's Triangle.
c. Review Balance sheet without your balances.
d. Philanthropy as a family: Guidebook "Philanthropy and Legacy: Making your Mark."
e. Family Mission Statement: A collection of values and thoughts from your family
f. Agendas for family meetings

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