



The Family Wealth & Unity Assessment

The following is a short assessment to help you determine if **The Family Wealth & Unity Plan** is right for you. This plan begins when your family funds your own **Enduring Family Wealth & Unity Trust (EFWUT)** and includes a **ten year coaching program** to ensure your family has the very best opportunity to sustain your wealth and unity for many generations to follow.

First Question: Do you want to stay in close contact, share common values and work together to preserve and grow the legacy you will be leaving? Yes / No (No ends the survey.)

Importance or ‘Value to you’
(5 = Very Important; 1 = Don’t Care)

Family Achievement Rating
(5 = Do already; 1 = Don’t do yet)

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| 5 | 4 | 3 | 2 | 1 | We have created a culture to openly discuss the family’s financial wealth with our children. The amounts and our intentions are well known. | 5 | 4 | 3 | 2 | 1 |
| 5 | 4 | 3 | 2 | 1 | Each generation has recorded their own life story, complete with lessons and experiences that will help future generations prosper and grow. | 5 | 4 | 3 | 2 | 1 |
| 5 | 4 | 3 | 2 | 1 | Our whole family meets to have fun, to bond, and to discuss new ideas and initiatives to strengthen and unify our family. | 5 | 4 | 3 | 2 | 1 |
| 5 | 4 | 3 | 2 | 1 | We have elected a family council to lead us and have governance in place to allow everyone to have a fair voice in family decisions. | 5 | 4 | 3 | 2 | 1 |
| 5 | 4 | 3 | 2 | 1 | Our family all know our professional advisors who all work together as a true collaborative team. (not individuals who each report to you) | 5 | 4 | 3 | 2 | 1 |
| 5 | 4 | 3 | 2 | 1 | We have embraced the diversity which comes through marriage and our in-laws feel loved and connected, and are valued in our family. | 5 | 4 | 3 | 2 | 1 |
| 5 | 4 | 3 | 2 | 1 | We have our own family shield, motto and values statement which we have created as a family to celebrate and emphasize who we are and what we care about. | 5 | 4 | 3 | 2 | 1 |
| 5 | 4 | 3 | 2 | 1 | We have created a permanent, creditor-proof fund to backstop and guarantee our family’s wellbeing for hundreds of years to come. | 5 | 4 | 3 | 2 | 1 |

Last Question: Is it personally worth it to invest the time, effort, and money required over the next ten years to ensure your family will stay strong and united long past the next 100 years? Yes / No

Only 10% of wealthy families hold their wealth and family together for three generations. Those 10% who survive, already have **Family Wealth & Unity Plans.**

If you have answered YES, to the first and last question and your family is not doing most of the things mentioned above, then call to discuss how you can.