



## The Family Wealth & Unity Assessment

The following short assessment may help you determine if **The Family Wealth & Unity Plan** is right for you. This plan was created to ensure your family has the very best opportunity to sustain your wealth and unity for many generations to follow.

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

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

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 a family council which meets regularly to discuss the business of being a family and to allow everyone to have a voice and to learn.	5	4	3	2	1
5	4	3	2	1	We have examined our estate, tax & business plans and filled every hole. All family members have taken part. We have full financial transparency for our children and have created 'Our Perfect Estate'.	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 children's spouses feel connected and valued in our family.	5	4	3	2	1
5	4	3	2	1	We have captured your parents life story, and have begun to write our own story, to perpetuate our family legacy for generations.	5	4	3	2	1

Is it personally worth it to invest time, attention, and money at this stage in my life to give my family the best chance to stay strong and united for the next 100 years?  
Yes / No / Not sure

Only 10% of wealthy families hold their wealth and family together for three generations. 90% don't survive because parents fail to engage their children in creating a larger purpose for their financial fortunes. Without talking, eventually children will misunderstand the real reason behind your family's wealth and they will stop doing the things you do now. They will spend instead of build, and their children will start over.

*200 year old Scottish proverb:  
First generation buys, the second builds, the third sells, and the rest beg.*

If this has created questions in your mind about what is possible. Call us and we can help.