FAMILY LEGACY PLANNING

Space for Reflection

What is the purpose of your wealth?

1.

2.

3.

What aspirational goals or passions do you have in life?

1.

2.

3.

Imagine future generations sitting around the kitchen table; how do you want them to remember you?

1.

2.

3.

Values Exercise

Circle some of the values that are most important you. Do this individually. If you are completing this with your family, each of you should do the worksheet independently and then discuss where you overlap, where you differ, and why.

Achievement	Empowerment	Growth	Perseverance
Authenticity	Equality	Honesty	Respect
Beauty	Equity & Inclusion	Humanity	Responsibility
Community	Excellence	Integrity	Self-actualization
Compassion	Fairness	Justice	Service
Connection	Faith	Kindness	Spirituality
Courage	Family	Leadership	Transformation
Creativity	Freedom	Love	Transparency
Diligence	Generosity	Loyalty	Truth
Diversity	Goodness	Peace	Wisdom

Other:

CORIENT

Philanthropic Areas of Interest

What causes are you most passionate about?

Circle some of the values that are most important you. Do this individually. If you are completing this with your family, each of you should do the worksheet independently and then discuss where you overlap, where you differ, and why.