

# Family Legacy Self Assessment

	AGREE	DISAGREE	CURRENT NEED	FUTURE NEED
<b>INTENT: VISION AND VALUES</b>				
.....				
We have a vision for the future of the family wealth / family office / Family Business which everyone buys into	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have shared values which bind the family together and form the basis for decision-making	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>WEALTH</b>				
.....				
We agree what the purpose of our family wealth is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have discussed our hopes and fears in relation to the impact of the wealth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We understand and have discussed our own attitudes to wealth and have a shared perspective as parents and as a family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have an investment philosophy / attitude to risk that everyone buys into	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have discussed and agreed our approach to 'fair or equal' that everyone buys into	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have a process for preparing family members for the responsibilities/management/ stewardship of wealth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have put measures in place for protecting our family's financial assets from key risks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>COMMUNICATION</b>				
.....				
We hold regular family meetings for family wealth discussions (including on our philanthropy and learning needs for our family)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We openly discuss important and difficult issues during the meetings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We regularly meet socially as a family and enjoy such interactions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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