The following is a quick assessment to determine what areas are most important to you and your family and where you feel you currently are in each of these areas. This will help you to understand your priorities as it relates to the different aspects of WEALTH.

**Rate Order of Importance Family Achievement Rating**

(5 = Very Important; 1 = Don’t Care) (5 = Mastered; 1 = Haven’t Started)

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Our family communicates well, and is effective at discussing sensitive topics.

I desire to minimize estate taxes, and have the planning in place to do so.

I have clear values that guide my purpose, and integrate them into my life and share them with the people who are important to me.

My family has a shared vision, and I have adequately prepared my heirs to effectively perpetuate that family vision and legacy for future generations.

Our family encourages open discussions and effective decision making.

I desire to ensure lifetime financial independence.

I would like my family to stay connected and unified, and have a structure in place to keep my children, grandchildren and great-grandchildren connected and unified.

My professional advisors work together as a true collaborative team, and not as individual advisors who share information.

I have prepared my heirs for the responsibility of both the financial and emotional aspects of their inheritance.

I desire to transfer to my heirs the family story, life lessons, vision and

values along with my valuables and continue to do so for future generations.

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Are you confident that your heirs are prepared to take on the responsibility of the family legacy and their inheritance – both the emotional and financial aspects?

 Do you feel an obligation to prepare them for these responsibilities?

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