



Rate Order of Importance

(5 = Very Important; 1 = Don't Care)

Family Achievement Rating

(5 = Mastered; 1 = Haven't Started)

5 4 3 2 1	Our family communicates well, and is effective at discussing sensitive topics.	5 4 3 2 1
5 4 3 2 1	Each family member is confident they have a voice within our family and permission to assert themselves.	5 4 3 2 1
5 4 3 2 1	I have identified my values that guide my purpose, integrated them into my life and share them with the people who are important to me.	5 4 3 2 1
5 4 3 2 1	Our family meets regularly for family fun, growth & development.	5 4 3 2 1
5 4 3 2 1	We have developed a process for our family to make decisions together.	5 4 3 2 1
5 4 3 2 1	We have a structure in place to keep my children, grandchildren and great-grandchildren connected and unified.	5 4 3 2 1
5 4 3 2 1	Our advisors work in collaboration on behalf of our family.	5 4 3 2 1
5 4 3 2 1	Our family actively mentors future generations by preparing them for the emotional as well as the financial wealth they will receive.	5 4 3 2 1
5 4 3 2 1	We have a plan for a genuine transfer of leadership.	5 4 3 2 1
5 4 3 2 1	Our family has captured our story and life lessons for the benefit of future generations.	5 4 3 2 1
5 4 3 2 1	We have created opportunities for our next generations to develop and utilize collaborative skills.	5 4 3 2 1
5 4 3 2 1	We have identified the best role for each of our family members that leverage their unique talents/gifts.	5 4 3 2 1
5 4 3 2 1	We have defined what matters to our family.	5 4 3 2 1
5 4 3 2 1	Our family has a clear understanding of the causes and organizations that we would like to support.	5 4 3 2 1

Are you confident that your children and grandchildren are ready to protect, manage and grow their inheritance? Yes / No

If your answer is 'no' would you like to have that confidence? Yes / No

Signature _____ Date _____