

Money, Meaning and Choices: Ongoing Family Meeting Process

STEP ONE

Values Retreat G1

- Education on best practices of successful families
- Identify & discuss important questions and issues regarding the saving, spending, sharing, and transferring of money
- Define core values framework for financial, philanthropic, and legacy decision-making
- Set criteria for distributions to the next generation
- Develop action plans to implement Core Values Framework for financial decisions



STEP TWO

First Family Meeting G1 & G2

- Best practices of successful families
- Develop shared family values and mission
- Cultivate family communication about wealth stewardship and family connection
- Have a multigenerational dialogue: expectations and guidelines for individual and family money related goals and objectives
- Begin discussions of Family Governance

STEP THREE

Choices of Future Meetings

