



## Financial **INSIGHT**



Every family has its “unwritten rules.”

The house everyone gathers at. The holiday traditions. That story from 100 years ago that gets re-told year after year.

Those things don’t happen by accident. They reflect what matters most.

When it comes to wealth, many families spend years building it, yet they forget to clearly state what that wealth is actually for.

A will answers *who gets what*. A family mission statement answers *why it matters*.

Sustaining wealth across generations takes organization and alignment. It means taking the time to outline your values, purpose, and expectations that will guide decisions long after you’re gone.

Whether you’re a retiree, a business owner, or an executive, here’s some helpful guidance to craft a family mission statement that bridges the gap between financial capital and generational purpose.

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## Retirees: Turn a Life Well Lived into Direction

You've accumulated more than assets. You've built perspective, values, and stories worth carrying forward. This season is the perfect time to write them out and share.

### ✓ Start Here

What do you want your family to stand for, not just inherit?

### ★ Take Action

Create a simple Values Inventory.

- What has mattered most in how you live your life?
- What do you hope your wealth enables, not just today, but 30 years from now?
- What is the purpose behind your key assets (homes, investments, charitable giving)?

*Example:*

Is the family home just a property... or is it meant to keep future generations connected?

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## Business Owners: The Role of the Business in the Family

Your business may be your largest asset, but without clarity, it can also become your family's biggest source of tension.

### ✓ Start Here

What role should the business play in your family's future?

### ★ Take Action

Use your mission to clearly define your vision.

- Who is expected (or not expected) to be involved?
- Is the business meant to be operated, sold, or stewarded?
- How will wealth from the business support your family values (lifestyle, philanthropy, opportunity)?

Clarity now prevents conflict later.

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## Executives: Bring Alignment Home

You've led teams, grown organizations, and executed on ideas. Managing your family's future requires that same level of care.

### ✓ Start Here

What does it mean to carry your family name?

### ★ Take Action

Schedule a family meeting to review the following:

- What are your family's three core pillars (e.g., education, generosity, integrity)?
- How should these values guide decisions around money, time, and priorities?
- What expectations do you want to make clear now to avoid confusion later?

Define your family's culture as a team.

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## Bringing Adult Children into the Conversation

This is where most families stall. When engaging adult children, the goal is collaboration.

### Shift the Approach

- **Ask, Don't Tell:** What do you want our family to be known for?
- **Build Together:** What is most important to you and why does it matter?
- **Make it Real:** Which stories, pictures, and videos support the larger vision?

In today's world, there are no rules. Let your approach evolve as your family grows.

### Your Legacy Doesn't Need to Be Perfect. It Just Needs to Be Started.

Don't wait. It's truly the gift that keeps on giving when you share what's important, create alignment, and provide a sense of purpose for your family and your wealth.

If you'd like help turning these ideas into something tangible, we're here to guide you. Simply click reply to this email for the five questions we use to get started.



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