Family Wealth Conversation Checklist

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1.	All family members **know the family history** and how their predecessors worked to arrive at the family wealth.	
2.	Our beneficiaries are familiar with the **general framework of the family's estate plan,** and understand how it impacts them.	
3.	Beneficiaries have been **made aware** of the family's estate plan, and future roles and responsibilities.	
4.	Our family has **discussed the ultimate distribution** of our keepsakes, art and collectibles.	
5.	We provide **travel funding for family members** to develop fresh perspectives, a sense of adventure and cultural diversity.	
6.	Our **family is prepared** in the event of a medical emergency or an unexpected health diagnosis.	
7.	Our family has a **charitable giving program** to foster a culture of gratitude and generosity.	
8.	Our family has **discovered the values we share in common** and want to pass to future generations.	
9.	Our family is **getting the most** from each of our professional advisors.	
10.	We **have a plan in place** today for our financial future and have created a pathway to prepare our beneficiaries.	