CHECKLIST

Trusted Family Advisor®

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1.	I am aware that the **greatest wealth transfer in history** is underway and that a vast majority of heirs change advisors upon receiving their inheritances.	
2.	I define my clients by **their entire families:** grandparents, parents, children, grandchildren and spouses.	
3.	I am aware that **70% of family wealth transfers result in loss of control of assets and family unity,** and I know the reasons why.	
4.	I am aware that **women will control 70% of U.S. wealth** by the end of the this decade.	
5.	I am aware that successful families are more concerned about the **impact of wealth on their children** than the **amount** of wealth that will be inherited.	
6.	I understand why **family meetings are important** and how they help align families for a successful wealth transfer.	
7.	I can suggest **conversations all families can have** that build trust and improve communication and family unity – all necessary for a successful wealth transfer.	
8.	I offer **generational wealth planning for the entire client family** that includes addressing the future success of the children.	
9.	I offer generational wealth planning to **clearly differentiate my business** with prospective client families and influencers in my community.	
10.	I have a competitive advantage by using new tools and resources that **prepare families to prosper and thrive** across generations.	