

*“If you ask me what I
came into this life to do, I
will tell you:*

I came to live out loud.

-Emile Zola

Thriving Legacy Families

Building Resilience and Adaptability Across Generations



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Resilience



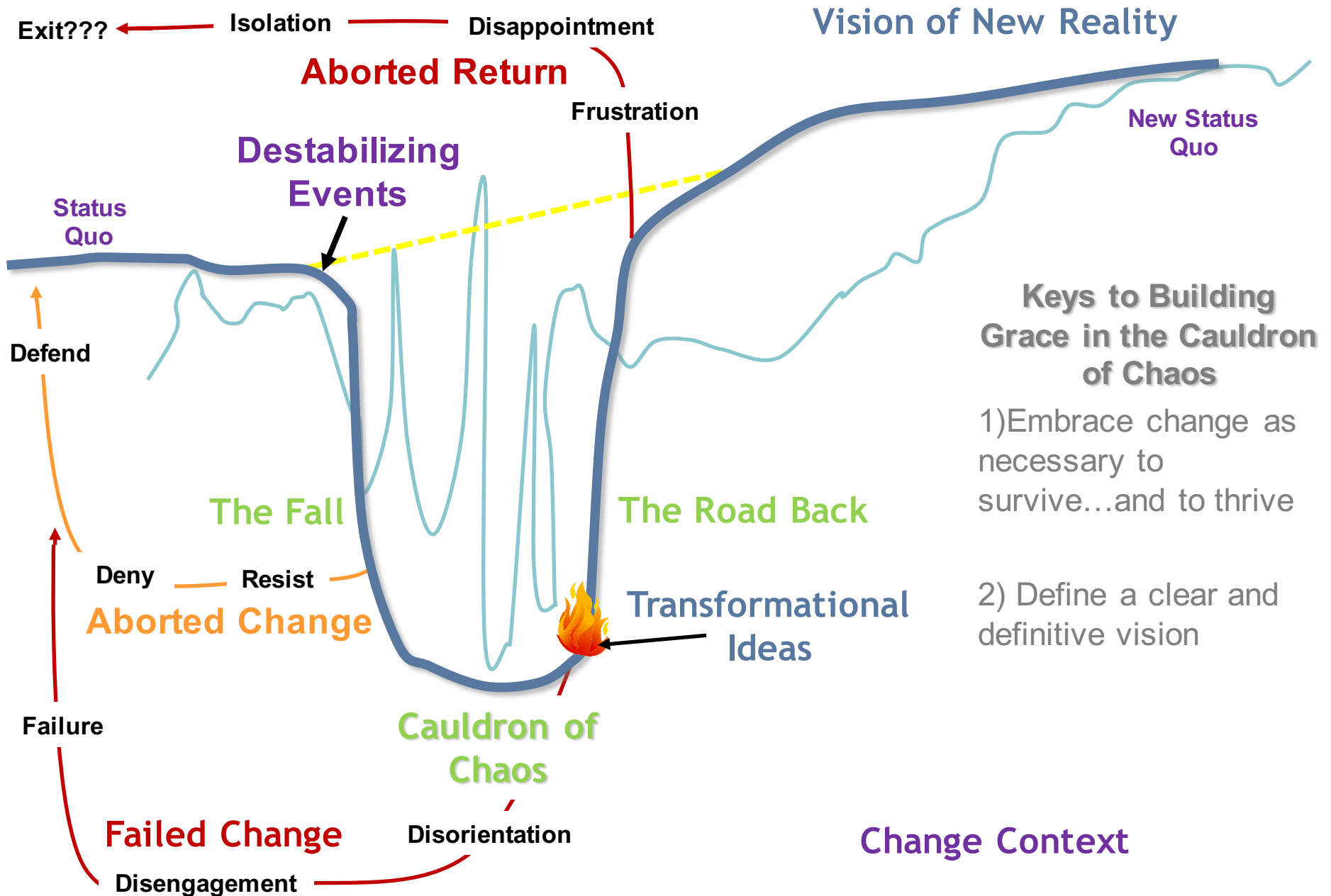
Adaptability



Vision



Building Adaptability and Resilience



Roadmap for a Thriving Legacy Family

Why?

*Expressed through
your Values*



What?

*Expressed through
your Vision and Money
Purpose Statement*



How?

*Expressed through
your estate and
financial plan, giving
plan, and the legacy
you want to leave*

Uncovering Your 'Why':

Top Motivational Values

**Loyalty
Compassion
Integrity
Helping
Community
Friendship
Family
Justice
Obligation**

**Responsibility
Tolerance
Courage
Risk
Pleasure
Freedom
Innovation
Personal Growth**

**Spiritual Growth
Opportunity
Effectiveness
Leadership
Power
Equity
Tradition
Recognition**

Clarifying Your 'What':

Your Vision Statement

- Written in the present tense, even though it describes a future reality
- Select a timeframe that feels like it reaches into the future, but doesn't feel intangible (anywhere from 5 - 20 years)
- Try first writing one for yourself, then collaborate with your spouse/family
- Holds true whether you have money or not

Clarifying Your 'What':

Your Vision Statement

Example

The 20-year vision for our family is that, above all, we like each other. We envision:

- Deep connectedness with each other, including the new members of our family.*
- Each of us is thriving: pursuing endeavors of purpose.*
- That our children will be experiencing the confidence and satisfaction of earning income in their own right.*

Clarifying Your 'What':

Your Vision Statement

Example

Our 20-year vision for our family is:

That each of us is experiencing the joy and harmony of a strong family committed to living out God's call in each of our lives.

That each of our children have experienced/are experiencing the satisfaction of accomplishment.

Clarifying Your 'What':

Wealth Purpose Statement

- Where your Vision and Values meet your money
- Designed to help you clarify the purpose for your wealth
- Gives you a 'litmus test' of how consistently you spend/save in accordance with your Values and Vision
- Gives purpose to what you save and how you spend or how you invest

Clarifying Your 'What':

Wealth Purpose Statement

Example

The purpose of my wealth is to create security for myself and my family. After that it will be used to create the opportunity for life experiences. I will consciously choose experiences over the accumulation of possessions.

Clarifying Your ‘What’:

Wealth Purpose Statement

Example

The purpose of our wealth is to empower our family members and the organizations we support. Our gifting will not hinder the thriving of the people and organizations that we love. Our wealth will not be given in a way that would jeopardize our family members’ ability to take on normal responsibilities or experience the satisfaction of accomplishment.

Identifying Your ‘How’:

Financial, Giving, and Legacy Plans

“You can’t plow a field by simply turning it over in your mind.”

- Gordon B. Hinkley



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