



Planning – goals, aspirations, what matters most

Please take the time to answer these questions. They will help in preparing for when we meet to detail what your needs, goals and purpose are going forward. There are no wrong answers, only the way it is. Capture everything, write it down.

<p>What I am most proud of....</p> <p>And why I am most proud of this/these things....</p>		
<p>My definition of success is....</p>		
<p>The 4 things I live for, or can't live without are....</p>	<p>Live for....or can't live without</p>	<p>Because....</p>
	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>
<p>Others tell me my strengths are</p>		
<p>What can hold me back if I let it....</p>		
<p>What I want for my family going forward.....</p>		
<p>What my ideal career/business pathway looks like going forward.....</p>		

The legacy I want to create is....	
What I don't know about, or what I want to understand about the Family Business is....	
My definition of family unity is...	
My expectations for what happens to the family businesses are....	
Ideas I have for what happens to the family businesses are....	
Challenges that I see the family need to deal with are....	
Opportunities that I see are available to the family are	