

YOUR THOUGHTS ON MONEY



When planning your financial future and that of your loved ones, you must first consider your thoughts about money and the role it plays in your life and theirs. These thoughts will impact how you view money and how you would like to pass your money on to the next generations. Ask yourself the following important questions as you begin to outline how you intend to leave your wealth to future generations.

- What does money mean to me?
- Am I concerned that I will run out of money?
- Am I comfortable telling my family about my plans for my wealth?
- What do I want to teach future generations about money?
- What does financial competency look like, and how can I help future generations develop it?
- Do I worry about creating an entitlement mentality among my children, grandchildren, and subsequent generations?
- If I leave a large sum of money, do I think future generations will squander it?
- Do I think outside influences will take advantage of my children and grandchildren if I leave them a large sum of money?
- Do I want to treat my children and grandchildren equally or fairly?

Answering these questions is the first step to understanding the legacy you want to leave to your family. The next step is to meet with us to put that legacy into legally enforceable documents that will protect you and your family from whatever the future may hold.

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