

Family Wealth Legacy Interview Questionnaire: What About The Kids?

1. Tell me a little about your children. What are their names? If you had to pick one word to describe each of them, what would it be? Why?
2. What do you see as each child's greatest strength or gift?
3. What has been your proudest moment with each child?
4. Your values and lessons in life are as important a part of your family heritage as monetary assets. What are the most important non-material assets you want to pass on to your children?
5. Which values and principles do you think will help your children live happy and fulfilling lives?
6. If, by some misfortune, you did not live to see your children reach adulthood, who would you want to be their legal guardian? Why did you choose this person?
7. If you could distill all your words of wisdom down to a single theme, what would you want your children's guardian to pass on to them in your absence?
8. While you can only choose one individual as a guardian for your children, I know there are many people in your life that you would want to stay in touch with them as they grow. Who are these people? Why do you want them to remain involved in your children's lives?
9. Do your children have any health issues that their guardian should be aware of? Are you aware of any possible genetic medical conditions that could affect your children?
10. Does your family have a specific religious or spiritual tradition that you want your children to be raised in? Do you have strong spiritual or faith based beliefs that you want to ensure are passed on to your children?
11. How much emphasis does your family place on education? How do you feel about classroom teaching vs. world experience? Are there specific educational opportunities (i.e. possible exchange student or overseas education opportunities) that you want to make sure your children have the option of?
12. How do you feel about the distribution of any monetary assets you leave for your children? Do you want them to be made available for whatever your children want or would you prefer that specific needs are met before discretionary funds are used? Do you feel it necessary to establish specific guidelines for how the funds you leave for your children are spent?
13. Do you have a personal philosophy about money that you want instilled in your children?
14. Do you have family traditions or special activities that you would like to ensure that your children carry on?

15. How do you want your children to remember you? If there was one thing you could tell your children on their 21st birthday, what would it be?

Family Wealth Legacy Interview Questionnaire: What Matters Most To Us

1. How did the two of you meet? How long did you know each other before you knew you wanted to build a life together?
2. What character or personality traits first drew you to each other?
3. What do you think are the most important things to consider when choosing a life mate?
4. What do you think is most important in developing and maintaining a loving relationship or a strong marriage?
5. How would you define a successful family relationship?
6. Were your family traditions similar or have you blended traditions that were vastly different to create your own traditions?
7. How much emphasis did each of your families place on education? Have you continued that level of importance in your own family dynamic?
8. Do you come from similar religious backgrounds? How important was religious tradition in your upbringing? Have you continued that level of importance in your own family?
9. How do you feel about your job or choice of career? If you had it to do over again, would you choose the same field? How do you want your children to feel about choosing a career or their life's work?
10. Would you advise your children to do what they're passionate about or choose a career that will primarily provide steady pay?
11. Are there any life lessons that you have learned in the course of earning a living that you would want to impart to your children?
12. Do you come from a strong tradition of community involvement? How important do you think it is to give back to the community or the church? Do you want to make sure that your children carry on that tradition?
13. Are there any specific causes, charities, organizations or civic activities that you feel strongly about or devote a substantial amount of time to? Why are you drawn to those specific activities? How do you see them furthering the greater good?
14. What do you think is more important – monetary wealth or a sense of purpose?
15. How do you normally spend family vacations? Do you take family vacations? Are there any specific vacations that you remember most fondly?

16. What do you think the future holds for you and your family? How do you see your family situation in 5, 10 or 15 years?

Family Wealth Legacy Interview Questionnaire: The Importance of Values

1. Where did you grow up? Were you a small town or big city child? What are some of your favorite childhood memories?
2. What was your family like when you were growing up? How many children were in your family? Were you the oldest, youngest, middle child?
3. What life lessons did you learn from your family?
4. Who would you consider to be your hero or role model? What about this person would you want to emulate?
5. What do you feel like you've had to overcome in your life to be successful? What lessons did you learn in overcoming it?
6. Who is your best friend? How long have you known this person? What family member are you closest to? Why?
7. How would you define "friendship?"
8. Do you consider yourself to be especially health conscious? What do you think is most important in sustaining good health?
9. What personality or character trait do you admire most in others? In yourself?
10. How would you define a rewarding life?
11. Of all the things you've done or accomplished in your life, what has given you the deepest sense of fulfillment?
12. Do you consider yourself to be a spiritual person?
13. What spiritual values would you like the people around you to know you feel strongest about?
14. Do you have a list of things you've always wanted to do or accomplish in your lifetime? If so, what are the top 5 things you would like to do or accomplish before you die?
15. Are there any specific life lessons that you want to ensure that your loved ones learn from you?
16. Is there a specific period of your life that you would like to live over again? If so, why? What would you change?
17. Has there ever been a time in your life when you felt the most clarity of purpose? When? Why?
18. If you knew you had 3 months left to live but had no physical or mental limitations during that time,

what would you do with the time you had left?

Family Wealth Legacy Interview Questionnaire: Words of Wisdom

Family

1. What is your family background? Are there specific cultural traditions that were important to your family? Are there important lessons you learned from your family?
2. If you were asked what makes a successful family, what would you say?
3. We all learn good and bad lessons from our families as we grow up. What were the lessons that stuck with you the most?
4. If you had to choose one quality about each of your immediate family members that you admire most, what would you say about each one?
5. If you could only choose 3 things for your family to remember about you when you're gone, what would they be?
6. What are the most important family lessons you want to pass on to your children and your grandchildren?

Values

1. What do you think are the most significant changes that have occurred in society during your lifetime?
2. What guiding principles do you live by? Why do you consider them to be important?
3. Do you have any interests or activities that bring you the greatest sense of fulfillment? Do you engage in any activities that you consider more for the greater good than for your own? Why are you drawn to these activities and what do you hope to accomplish with them?
4. Where do you find inspiration or guidance for living a better life?
5. What do you consider the most difficult period of your life, so far? What did you learn from it?

Career

1. What have you learned over the course of your career that you would share with those who come after you?
2. Do you think there is a secret to finding the right career? If so, what is it?
3. Do you believe in people having a true calling?
4. Do you adhere to a specific philosophy when it comes to money? Are you a saver or a spender?
5. If you could go back and choose a different career, what would you choose to do? How would you live your life differently?

Service

1. Are you involved in any community service activities? If so, what are they? Which ones bring you the greatest sense of satisfaction?
2. If you suddenly won the lottery and had an extra \$1 million to give to a charity or a cause, what would you do with it? How would you choose the recipient?

Life Lessons

1. Who would you consider to be your most trusted advisor? What is the most valuable piece of advice they ever gave you?
2. From childhood forward, what have been the most significant changes you personally have undergone?
3. What do you consider your greatest success? Why?
4. Is there any area of your life that you consider “unfinished business”? Do you have any concrete plans for finishing these tasks?

Religion/Spirituality

1. Do you follow any specific religious or spiritual tradition? Were these traditions learned from childhood or through exploration as an adult?
2. Do your spiritual or religious traditions affect your world view and how you see other people? How you see yourself?
3. Are there specific tenants of your religious or spiritual faith that you want to ensure your children learn and follow?

Family Wealth Legacy Interview Questionnaire: My Final Wishes

1. Has there been a particular part of your life that has brought you most joy? The most sadness?
2. Who have you learned the most from in your life? Good and bad.
3. Is there any particular accomplishment in your life that you are the most proud of?
4. Who do you consider to be closest to you? Why?
5. Have you made any plans for how you will spend the latter part of your life? If so, what are they?

What do you hope to accomplish?

6. Are you a religious or spiritual person? What is your most profound spiritual or religious belief?
7. Has a religious or spiritual practice given a deeper meaning to your life? If so, what is that belief or practice?
8. At some point we all have to consider end of life issues. Are your plans for the end of your life based on religious or spiritual beliefs?
9. If you went in to your doctor today and he told you that you had 2 weeks left to live, is there anyone you would want to talk to? If so, what would you say to them?
10. What worries or concerns you the most about your health and any decisions that need to be made about your medical care or efforts to prolong your life when you can no longer make those decisions yourself?
11. Have you designated anyone to make decisions for you regarding medical care when you are no longer able to make those decisions? Have you discussed this selection with them? Are they aware of your wishes?
12. Why did you select this particular person to make your end of life decisions?
13. Which is more important to you – quality of life or employing any and all measures available to prolong your life?
14. What would you want your physicians to know about your wishes for pain management?
15. If next Tuesday was to be your last day on earth, how would you spend it? Who would you want to spend the day with? Where would you go?
16. What frightens you the most about the end of your life?
17. Do you believe in organ donation? Are there any circumstances under which you would not wish to donate your organs?
18. Have you given any thought to how your life should be memorialized? Would you prefer a funeral or a memorial service? Cremation or burial? What would bring the most comfort to your survivors?
19. Do you have any favorite scriptures, songs, readings, poems, etc. that you would want included in the service? Who would you want to eulogize you?
20. If you would prefer not to have any kind of formal service, would you want a special day set aside for remembrance?
21. Do you currently have a will, a living trust, a living will or other legal documents affecting the disposition of your estate? If so, where are they kept?
22. How would you want your family and loved ones to honor your memory?
23. How do you want to be remembered?

Family Wealth Legacy Interview Questionnaire: The Care of My Pets

1. How old were you when you had your first pet? What kind of pet did you have?
2. Which pets do you remember the most?
3. Where did you get your pets?
4. What do you remember most about them? What is your happiest memory about your pet(s)?
5. What do you see as the most difficult thing about owning a pet?
6. What are some of your favorite stories about any of your pets?
7. Do you think pets improve a person's quality of life?
8. Were pets an important part of your family life as a child?
9. Was a love of animals something that you learned as a child?
10. Do you think animals help people? If so, how?
11. Do you participate in any activities or organizations to help other people get more enjoyment from their pets?
12. Is pet ownership an important part of your life?
13. Have you made legal or financial arrangements for the care of your pets if something happens to you?
14. Have you chosen a primary caregiver for your pets? Do they know you have chosen them to take care of your pets? Are there any other people you want to make sure remain involved with your pets after you are gone?
15. What do you consider the ideal pet/person relationship?
16. If you could give pet owners any advice, what would it be?
17. What worries you most about how people care (or don't care) for their pets?
18. If you had the financial resources to solve one problem regarding animals, what would it be?
19. Are you involved with any organizations that have impacted how you interact with your pets?
20. Do you have any plans to financially support animal related charities? If so, how did you choose these specific organizations or causes? What do you want your money to accomplish? What is your greatest fear about how your money will be used?
21. How do you want your chosen causes or charities to view you when they receive the funds?
22. Do you hope that your gift will inspire others? Do you want your gift to be publicly recognized?

Family Wealth Legacy Interview Questionnaire: My Special Needs Child

1. Tell me about your special needs child. What do you admire most about them?
2. What are your special needs child's strengths?
3. Which of their accomplishments are you proudest of?
4. How did you feel when you were first blessed with this child?
5. What is most important about your relationship with them?
6. How has being the parent of a special needs child changed your belief or understanding of special needs children?
7. What do you think is the most common misconception about special needs children?
8. If you could share something with others about your child that might help them better understand not only your child's needs but the needs of special needs children in general, what would it be?
9. Do you have a code or some specific belief system that you have tried to follow in raising your child?
10. Have you designated anyone as a guardian for your child in the event that something happens to you? Have you discussed the designation with them? How did you choose this particular person?
11. Do you have any specific advice for them to follow in caring for your child?
12. Aside from the person you have designated as a guardian for your child, are there others you want to make sure continue to be involved with your child?
13. Are there any health concerns or medical issues that your child's guardian needs to be aware of and plan for?
14. Do you have a preference of religious or spiritual tradition that you want your child to be raised in?
15. Does your child attend formal school classes? What grade are they in?
16. Are there any educational opportunities that you want to ensure your child is offered?
17. How do you feel about the distribution of any monetary assets you leave for your child? Do you want them to be made available for whatever your child wants or would you prefer that specific needs are met before discretionary funds are used? Do you feel it necessary to establish specific guidelines for how the funds you leave for your child are spent?
18. Do you have a personal philosophy about money that you want instilled in your child?
19. If you could have one wish granted for your child's future, what would it be?
20. How do you want your child to remember you? What do you want the people around your child to

tell them about you, how you lived your life, and how you felt about them?

Family Wealth Legacy Interview Questionnaire: Our Legacy

Family and Early Years

1. What were the names of your parents and grandparents? Do you know where they came from? Did they pass on strong cultural traditions to you?
2. What do you think are the most important values you learned from your parents and grandparents?
3. Where are you from? Did you grow up in a small town or a big city or somewhere in between? Do you think your hometown had any effect on the person you grew up to be?
4. What is the single most important lesson you learned as a child? Do you still carry it with you? Who was the most important person in teaching you this lesson?
5. Who were the three most influential people in your childhood? How did they influence you? What do you remember most about them?
6. Did you have any life changing experiences in your early life? Describe them. Do you still feel the effects of these experiences as an adult?

Community Involvement

1. Are you actively involved in your community? Are there specific organizations that you feel strongly about? What do they mean to you?
2. Do you feel that one person can really make a difference in not only their community but the world? If so, how?
3. If you could choose three things to be remembered for, what would they be?

Financial Attitudes

1. What value does money have to you?
2. What are your greatest financial worries or fears?
3. What is the most significant lesson you have learned in life about money? What led to your learning this lesson?
4. What do you hope to accomplish with the monetary gifts you pass on to your loved ones?
5. If you could give your heirs one piece of advice about money or financial matters, what would it be?

Remember Me Fondly

1. What do you consider to be the three most important relationships you have had in your life? What has

each meant to you? What have you learned from each one?

2. What has been your proudest moment?
3. What has been your most gratifying accomplishment?
4. Is there anything you truly want to accomplish before you die that you have not done?
5. Is there any societal change you would like to see before you die?
6. How would you define a life well lived?
7. Do you think some people are more prone to living a good and rewarding life than others? Why?
8. What has been your single greatest challenge in life? Have you conquered it? If so, how?
9. What have you learned from facing your fears or challenges?
10. How do you define “success”?
11. If you could give your children and grandchildren one piece of advice for happiness, what would you tell them?
12. What do you want your family to remember you for? How do you want them to remember you?
13. What do you see as your legacy?