

CONNECTED FAMILY ASSESSMENT

Read the statements & rate the importance it is to you (5=very important 1=do not care). Then rate the level you are actually achieving it (5=Mastered 1=Have not started). There are no right or wrong responses.

This assessment will help you identify areas where you can intentionally improve your family's connectivity.



	Importance Rating (5=Very Important; 1=Do not care)	Family Achievement Rating (5=Mastered; 1=Have not started)
Our family communicates well, and is effective at discussing sensitive topics.	5 4 3 2 1	5 4 3 2 1
Each family member is confident they have a voice within our family and permission to assert themselves.	5 4 3 2 1	5 4 3 2 1
I have identified my values that guide my purpose, integrated them into my life and share them with the people who are important to me.	5 4 3 2 1	5 4 3 2 1
Our family meets regularly for family fun, growth and development.	5 4 3 2 1	5 4 3 2 1
We have developed a process for our family to make decisions together.	5 4 3 2 1	5 4 3 2 1
We have a structure in place to keep our children, grandchildren and great-grandchildren connected and unified.	5 4 3 2 1	5 4 3 2 1
Our advisors work in collaboration on behalf of our family.	5 4 3 2 1	5 4 3 2 1
Our family actively mentors future generations by preparing them for the emotional as well as the financial wealth they will receive.	5 4 3 2 1	5 4 3 2 1
We have a plan for a genuine transfer of leadership in our family.	5 4 3 2 1	5 4 3 2 1
Our family has captured our story and life lessons for the benefit of future generations.	5 4 3 2 1	5 4 3 2 1
We have created opportunities for our next generations to develop and utilize collaborative skills.	5 4 3 2 1	5 4 3 2 1
We have identified the best role for each of our family members that leverage their unique talents and gifts.	5 4 3 2 1	5 4 3 2 1
We have defined what matters to our family.	5 4 3 2 1	5 4 3 2 1
Our family has a clear understanding of the causes and organizations that we support.	5 4 3 2 1	5 4 3 2 1
Are you confident that your family is prepared for the financial and emotional responsibility of the family legacy?		Yes / No
Do you feel it is your duty to prepare them for these responsibilities?		Yes / No



What now? Take the next step and go to

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