



Planning - goals, aspirations and 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.

What I am most proud of.... And why I am most proud of this/these things....		
My definition of success is....		
The 4 things I live for or can't live without are....	Live for.... or can't live without	Because....
	1.	1.
	2.	2.
	3.	3.
	4.	4.
Others tell me my strengths are		
What I stand for is....		
If I had one hour free per day (7 hours per week) this is what I would do with it.... What is stopping me doing this now is		
Meaningful role(s) I see myself in over the next phase of my life are....		
The legacy I want to create is....		

What I don't know about, or what I want to understand about, my children is	
In one sentence, this is how I describe my 'life's work' so far....	
My definition of family unity is...	
My view (in the context of family) re equity and fairness is....	
My expectations for what happens to the family businesses are....	
Ideas I have for what happens to the family businesses are....	
What part I want to play in the family businesses is...	
Challenges that I see the family need to deal with are....	
Concerns (if any) that I have are	
Opportunities that I see are available to the family are	