

Women & Wealth | Wealth...The Next Generation: Identifying Your Gaps

Identifying Your Gaps (Next Generation) What gaps do you have in your financial, emotional and family intelligence?

Financial Intelligence

Circle the types of financial intelligence training you want to receive in the future.

Knowledge

Saving accounts

Investments

Student loans

Credit cards

Taxes

Skills

How to create a budget

How to evaluate an investment

How to negotiate a salary

How to evaluate whether to buy or rent a home

Other: _____

Insight

Money personalities

Money mindsets

Behavioral finance

Other: _____

What other areas do you want to explore and discuss further with your family?

Emotional Intelligence

On a scale of "1" (lowest) to "5" (highest), rate your family's communication skills and your emotional intelligence.

Family Communication: ① ② ③ ④ ⑤

Your Emotional Intelligence: ① ② ③ ④ ⑤

How can you and your family improve money talk skills, communication skills and emotional intelligence?

Family Intelligence

Put a "P" (Personal) next to your top three values and an "F" (Family) next to the top three family values.

_____ Adventure and travel

_____ Education

_____ Innovation

_____ Art

_____ Enterprise

_____ Spirituality

_____ Charitable giving

_____ Environmental protection

_____ Science Technology Engineering and Math
(STEM)

_____ Community service

_____ Gender equality

Other: _____

How can you incorporate your personal and family values into your career pursuits and life purpose?

Identifying Your Gaps (Parents/Grandparents)

What gaps do you notice in your family’s financial, emotional and family intelligence?

Financial Intelligence

Circle the types of financial intelligence training you want to provide to the next generation.

Knowledge

- Saving accounts
- Wants versus needs
- Investments
- Loans and credit cards
- Estate planning
- Other: _____

Skills

- How to create a budget
- How to do a cash flow statement
- How to read a prospectus
- How to calculate simple and compound interest
- How to prepare a tax return
- Other: _____

Insight

- Money personalities
- Money mindsets
- Behavioral finance
- Other: _____

What is the most important financial lesson you want to pass on to the next generation and why?

Emotional Intelligence

On a scale of “1” (lowest) to “5” (highest), rate your parents’/ grandparents’ money communication skills and rate your own skills as it relates to your children and grandchildren.

Your Parents’ Communication : ① ② ③ ④ ⑤

Your Family Communication: ① ② ③ ④ ⑤

What would you like to improve about your family communication skills and what type of support (advisor, counselor, family wealth consultant, minister, other) might you enlist?

Family Intelligence

Check off the top three values you want to pass down to the next generation.

- | | | |
|----------------------------|------------------|--------------------|
| _____ Adventure and travel | _____ Enterprise | _____ Honesty |
| _____ Art and music | _____ Family | _____ Innovation |
| _____ Education | _____ Generosity | _____ Spirituality |
| | | _____ Other: _____ |

What is your biggest challenge in passing down your wealth and family legacy to the next generation? How might you overcome this roadblock?

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