

What Issues Does Your Family Need to Address?

Shared Values and Guiding Principles	Definition of Family and Roles for Spouses	Family History & Legacy	Family Patterns and Polarities	Family Culture and Identity	Community Involvement
Alignment of Interests	Nuclear and Blended Family Inclusion	Responsible Ownership	Readiness for Change & Timelines	Complexity and Conflict Management	Family Philanthropy
Owner Engagement and Learning Culture	Family Leadership Development and Selection	Opportunities and Challenges		Shared Ownership and Control	Governance Process and Leadership Succession
Opportunities and Risks Assessment	Driving Forces and Key Uncertainties			A Shared Vision for the Future	Enterprise Charter and Strategies
Operating Business(es)	Direct Investments	Private Equity & Venture Capital Funds	Philanthropic Impact	Wealth Transfer Strategies	Private Trust Company
Real Estate Properties and Funds	Public Market Portfolios	Entrepreneurs Fund or Family Bank	Shared Vacation Property	Art and Collectibles	Cyber and Data Security

