

# MULTIGENERATIONAL PLANNING

## 6 Steps to Get the Next Gen Involved

### Parents fill out The Legacy Questionnaire™

To get a clear vision on their values, attitudes and preferences regarding wealth.

### Review Questionnaire Responses

After reviewing what they want to see happen, ask for introduction to the kids.

### Meeting with the Kids

Introduce The Legacy Family Questionnaire™ to understand the kids attitudes and expectations on wealth.

### Review Responses with Parents

Share the information with the parents before they build the plan so they can make informed decisions.

### Create an Executable Plan

Based on the feedback from the parents, create a plan that takes both parents and kids into account.

### Family Meeting

Educate the family around the plan. Led by the Advisor and/or a Family Wealth Counselor. Create plan for how often to come together.

Learn more at:

[THINK-LEGACY.COM](http://THINK-LEGACY.COM)