



# FAMILY FINANCIAL WORKSHOP

Courtesy of:  
Peter Smegielski, CFS®  
Financial Advisor

We have found that families who talk about money  
may do better financially over the long term.

**We developed this worksheet to help you explore  
your financial values, concerns, and priorities and  
to help you communicate them to your family.**

Please use this workbook to introduce financial topics  
and have important conversations about wealth with your  
children, grandchildren, and loved ones.

# DEFINING WHAT WEALTH MEANS TO YOU

What does wealth represent to you as a person?

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How do you feel about saving money?

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What is worth saving for?

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What are your feelings about spending money?

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How do you feel about going into debt to buy things?

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How has your income influenced your life?

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What are your concerns about the future?

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What's the story of your family's wealth?

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## TELLING STORIES ABOUT WEALTH



Describe a financial mistake or important lesson you've learned in life.

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Describe a time that you felt fortunate.

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Describe a time that persistence and effort paid off.

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Describe a time that you didn't have enough money.

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## CONNECTING WITH YOUR FAMILY

What do you wish you had known about wealth at your child's age?

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What worries do you have about your parents or grandparents?

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What activities would you like to do as a family?

- Sharing philanthropic work
- Sharing family stories
- Going through photo albums
- Writing down the family history
- Talking about the family legacy
- Discussing personal finance goals and priorities



