



Family Mission Statement

Develop a lasting legacy for your family by highlighting your values and utmost priorities. Take some time to answer the following questions. On the next page, write your answers together in sentence format. Share your mission statement with loved ones, your professional advisors, and embed it as part of your family culture. Make sure to refer to it frequently.

1. We are at our best when...

2. We are at our worst when...

3. What does your family love doing together?

4. As a family, how can we better help one another?

5. As a family, what can we give to others and how can we help people outside of our family?

6. What causes do we want to impact the most as a family?

7. What are the principles we want our family to be based on?

8. What does each of us want to be in the future?

9. What values do you want to share together?

10. What life lessons do you want your family to live by?

11. Share a future vision statement with your family.

12. What qualities do you hope are present in your family 20 years from today?

MISSION  WEALTH®

Your goals. Our mission.