A conversation about
What We Pass Down

A family legacy is more than the assets someone leaves behind. It can include stories, values, skills, generosity, and the choices that help the next generation move forward. Use these prompts to begin a conversation at your own pace.

STORIES AND LESSONS

01

What family story do you hope younger generations remember?

02

What did you learn about money from the people who raised you?

03

Which experience helped shape what matters most to you?

04

What lesson or tradition would you like your family to carry forward?

WHAT A GOOD LIFE LOOKS LIKE

05

What does having enough mean to you at this stage of life?

06

What people, experiences, or causes would you like to make room for?

You do not need to answer every question in one sitting. Choose one prompt and let the conversation unfold.

What we hope to pass down

Think about what you would want loved ones to understand, remember, or be able to find when life changes.

VALUES, HOPES, AND PREPARATION

07

What do you hope your family understands about your choices with money?

08

Are there values, causes, or responsibilities you hope to support?

09

What would you want the next generation to know about building a life they value?

10

What family stories, wishes, or lessons would you like to put into words?

A FEW PRACTICAL DETAILS TO DISCUSS

- [ ] Who should family members contact with questions about important documents or plans?
- [ ] Does someone trusted know where key records are kept?
- [ ] When were beneficiary designations and estate documents last reviewed?
- [ ] Is there a conversation or document that would make the next transition easier?

Choose one next conversation

WHO _____ WHICH PROMPT _____ WHEN _____

Next step: listen, write down a story, or decide what you want to revisit together.