

THE POWER OF GENERATIONAL WEALTH

QUESTIONS TO HELP YOU START THE CONVERSATION

1. WHERE TO START?

- What does wealth mean to you?
- Why is generational wealth important?
- How does education correlate to wealth?
- Why is saving and investing important?
- How early should you start?

2. THE FOUNDATION

- Mindset
 - What is your “why”?
 - What is important to you in life?
 - What makes you get up every morning
- Values
 - Who are you as a person?
 - What guides you in making decisions?
 - What do you stand for?
- Habits
 - How are you holding yourself accountable?
 - What are you doing to build wealth?
 - Do your actions speak louder than your words?

3. THE TRANSFER

- If something happened to you tomorrow, would your family be okay?
- What do you do when I’m no longer here?
- What legacy do you want to leave behind when you are no longer here?
- How will you empower the next generation?

For more information visit the websites below to contact a financial professional today