



LEGACY CAPITALS BLOG SERIES

VIRTUAL FAMILY EDUCATION



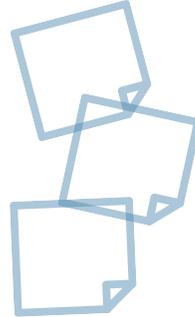
WHETHER YOU'RE TOGETHER or separated from your family members right now, we know you're doing your best to stay connected, and desiring to have meaningful conversations, but may be unsure where to begin. All of us are working to make vital pivots to adapt to this new reality, and facing unique challenges.

None of this is easy. We are committed to serving you during this challenging time, so we're sharing talking points and activities we commonly use in family meetings and workshops. We encourage you to implement them on your own and with your family to open dialogue and inspire you to thrive together.



1 | GRAB SOME STICKY NOTES & DISCOVER YOUR TRUE NET WORTH

GRAB THREE STICKY notes and watch this video for an exercise you can do with your family to expand your perspective on your TRUE net worth. This is a great activity during this time when financial markets are shaken, because it reinforces that our family's worth includes far more than just financial capital.



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2 | COMMUNICATING YOUR LIVING LEGACY

CHALLENGING TIMES, like we are experiencing now, have a way of bringing into sharp focus exactly what (and often who) is most important to us. As a result, we have a unique opportunity right now to self-reflect and ask ourselves:

Is the way I have been living my life aligned with my values – am I LIVING my intended legacy?

How has this current reality sharpened my focus on what is most important?

How can I do an even better job communicating to my loved ones what I believe is most important?

These are some pretty big questions, so allow us to offer some assistance! Watch this video, and download our tool, *Communicating Your Family's Living Legacy*, which offers prompts that will help you translate your thoughts into words that you may choose to share in written or verbal form with your loved ones. You'll find peace in knowing that you are living your intended legacy every day of your life and that you've communicated all that you'd hoped to share with your loved ones.

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3 | SELECT A PICTURE & SHAPE A FAMILY VISION

OUR LEGACY IMPRESSIONS card deck provides an effective and fun way to create meaningful conversations among family members. In this activity, you will use 12 images from our card deck to guide you and your family members through a vision-focused conversation together.

You can use these cards to reflect upon a number of topics or questions and, as you will see, we offer a handful of suggested questions to get you started.

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4 | SELECT VALUE CARDS & CREATE A SHARED VALUES STATEMENT

THE CAPITAL CARDS deck consists of 52 cards, plus one blank, and on the face of each card is represented a unique priority or value.



This exercise is a valuable and fun activity to help create a meaningful conversation within your family regarding what the top values and priorities are for each family member.. After each family member has shared both their priorities and their *why*, you will explore how you can roll them up into one shared values statement.

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5 | STEVE HARVEY & 5TH GENERATION LEGACIES

LIVING YOUR LEGACY. We say *living* your legacy, because we believe that the legacy you leave behind is really about how you choose to live each day. We also believe that your legacy is not something that is shaped in a day, but rather with intentionality over the course of a lifetime.

In this activity, you will first watch a four-minute video of Steve Harvey talking about his own intended legacy. Then, we will guide you and your family members through three discussion questions to help you shape and clarify your own individual as well as your family's living legacy.

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What is your intended legacy?

Am I / are we living in a way that we will accomplish our intended legacy?

What do you intend to leave your children, grandchildren, and great-grandchildren?

6 | MARK CUBAN & THE ANTIDOTE TO ENTITLEMENT

HAVE YOU EVER asked yourself or your spouse: *How do I ensure that we don't unintentionally raise entitled children?*

This activity is designed to help you begin to answer these types of questions for your family. More specifically, you will first watch a short video of Mark Cuban addressing this very topic.

After you watch the video, you will use three discussion questions to guide you, and perhaps your spouse, and to help you avoid the pitfalls leading to raising entitled children.

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"Money is a safety net, but that's not the most valuable skill that you could have going out to the real world."

Mark Cuban