

**FAMILY MEETING KICKSTART**

# 3 exercises to build early alignment

The following three exercises are designed to help your family align on shared values and wealth goals and create a unified mission statement to guide your business transition during a family meeting. Work through the following three exercises with your First Citizens Wealth planner.

**Exercise 1: Define your family values**
**Instructions:**

- In this first exercise, each person chooses three of ~20 values they have as an individual.
- Next, share your values as a group and write in the number of family members who selected each value.
- Total the rankings for each value chosen by family members.
- Rank from highest to lowest, with one being the top-ranked family value.

**Purpose:** These values serve as the foundation for your mission statement and help to guide future decisions.

**Exercise 1A instructions:** Circle the values that are most important to you individually, adding in any values not listed. Next, discuss as a group and write in the number of family members who selected each value.

| Family values         |                  |                 |              |
|-----------------------|------------------|-----------------|--------------|
| Communication         | Cooperation      | Dedication      | Spirituality |
| Stability             | Mentoring        | Entrepreneurial | Respect      |
| Hard work             | Ethical behavior | Humility        | Education    |
| Empathy               | Generosity       | Independence    | Diversity    |
| Community involvement | Family loyalty   | Humor           | Frugality    |

**Exercise 1B instructions:** Total the rankings for each value chosen by family members. Rank from highest to lowest, with 1 being the top-ranked family value.

**Top 3-5 family values**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## Exercise 2: Determine wealth goals

**Instructions:** This activity is about identifying your family's wealth goals. Each family member shares a single word or a short sentence that reflects their vision for their wealth. Then, the group works together to combine the ideas into one statement that captures the family's collective goal.

**Purpose:** Clarify how you want your wealth to create meaning, opportunities and impact. It serves as a guide for decision-making and ensures your financial goals align with your shared values.

### Step 1: Consider these questions

- How do you want your family to be remembered by future generations?
- When future generations look back, what impact do you want them to see your family has made?
- How do you want your wealth to shape opportunities and choices for future generations?

### Step 2: Review examples of wealth goals for inspiration

- Funding education for future generations
- Supporting charitable causes
- Preserving family property or traditions
- Encouraging entrepreneurship in the family
- Building a safety net for unforeseen challenges

### Step 3: Reflect as an individual

Each family member writes down one word or short sentence that captures their vision for the family's wealth goals.

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### Step 4: Share and discuss

Take turns sharing your ideas. Write down common themes, values and priorities.

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### Step 5: Create a collective goal

Work together to combine your ideas into one statement that captures your family's collective wealth goal.

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### Exercise 3: Create a family mission statement

**Instructions:** In this final exercise, your family will create a mission statement that captures who you are, what you stand for and what you're working towards together — not just as a business, but as a family. Using the values and characteristics you determined together in exercises 1 and 2, you will craft a statement based on the prompts included.

**Purpose:** This exercise creates a shared vision that guides your family's decisions, behaviors and relationships. As you transition your business, your mission statement grounds your decisions in your agreed-upon values and goals, helping align personal, family and business priorities during times of change.

**Instructions:** Use the prompts below to write a powerful, one-sentence mission statement.

#### To...

Describe a purpose or aspiration that energizes your family and requires each family member. *Examples: To grow together through new experiences and support each other unconditionally. To realize our dreams and goals as a family and as individuals.*

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#### In a way that...

Describe how you'll live out the above purpose, reflecting on the values and characteristics from exercise 1. *Examples: In a way that shows kindness, courage and curiosity. In a way that stretches our intellect, gives back to the community and tightens our family bond.*

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#### So that...

Describe the impact you want to have or the legacy you hope to create. Input your wealth goals here. *Examples: So that we build strong connections and leave a positive mark on the world. So that our legacy will continue to grow.*

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#### Final family mission statement:

Instructions: Write your family's final mission statement here and consider memorializing on a plaque or framed artwork.

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## Navigating a business transition?

Talk to your First Citizens partner about working with our Wealth team to create a plan your whole family can stand behind.

**Start the conversation today at [firstcitizens.com/wealth](https://firstcitizens.com/wealth).**

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