

# THE FAMILY WEALTH CHARTER FRAMEWORK™

Healthy beliefs about money I want my kids to learn:

Elements of a Wealth Family Charter that matter to me:

- 1. How often we meet
- 2. Family Values
- 3. What kinds of assets we like/don't like
- 4. How profits will be used
- 5. How the kids can participate
- 6. The rules of family money
- 7. How we might save towards bigger investments
- 8. How often we eat out/travel
- 9. Budgeting

Other Elements:

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