

# Estate Planning: Starting with What Matters Most

Estate planning entails making conscious choices with multigenerational implications. It should be approached thoughtfully and intentionally, with the process serving to support your vision of success as an individual and as a family.

We are here to help you navigate the technical and human considerations of planning. As a starting point, below are several discussion prompts designed to begin the process of articulating your vision of success, core values, and purpose of wealth in an effort to clarify your estate planning priorities and decision-making criteria.

## Reflecting on who you are and what success looks like to you

Who are the people and what are the experiences that have shaped me as an individual – and/or us as a couple?

What are the values, beliefs or principles that have been important to me/us and that we'd like to live, express, and share with the people we love or the world around us? Many find the below values inventory a helpful prompt for this exploration.

Accountability	Curiosity	Home	Openness	Service
Achievement	Dignity	Honesty	Optimism	Simplicity
Adaptability	Diversity	Hope	Order	Spirituality
Adventure	Environment	Humility	Parenting	Sportsmanship
Altruism	Efficiency	Humor	Patience	Stewardship
Ambition	Equality	Inclusion	Patriotism	Success
Authenticity	Ethics	Independence	Peace	Teamwork
Balance	Excellence	Initiative	Perseverance	Thrift
Beauty	Fairness	Integrity	Personal fulfillment	Time
Being the Best	Faith	Intuition	Power	Tradition
Belonging	Family	Job security	Pride	Travel
Career	Financial stability	Joy	Recognition	Trust
Caring	Forgiveness	Justice	Reliability	Truth
Collaboration	Freedom	Kindness	Resourcefulness	Understanding
Commitment	Friendship	Knowledge	Respect	Uniqueness
Community	Fun	Leadership	Responsibility	Usefulness
Compassion	Future generations	Learning	Risk-taking	Vision
Competence	Generosity	Legacy	Safety	Vulnerability
Confidence	Giving back	Leisure	Security	Wealth
Contentment	Grace	Love	Self-discipline	Well-being
Contribution	Gratitude	Loyalty	Self-expression	Wholeheartedness
Cooperation	Growth	Making a Difference	Self-respect	Wisdom
Courage	Harmony	Nature	Serenity	Write Your Own:
Creativity	Health			

## Defining your vision of success

When I reflect on whether my life was well lived, what will stand out?

In what ways do I want to share my time, talent, and treasure with my community? What impact do I ultimately want to leave?

What kind of adults do I want my children to become?

When I envision my successful multigenerational family, how would I describe it?

Is there non-financial capital I can be more intentional in building to help us move towards that vision of success?

## The role of money in moving toward that vision

What is the purpose of our financial wealth? How can it be used to move us toward our vision for success?

How could financial gifts given to important people or causes in our life help us move toward what we want for ourselves and our family?

What are ways our estate plan might inadvertently contradict our values or work against what we want for ourselves, our family, or our communities?

What are some of the most important decision-making criteria we can use in shaping our estate planning?

## Need more help?

Pathstone's team of fiduciary, philanthropic, and family dynamics experts are here to serve as a sounding board or to work through all human and technical aspects of estate planning. We can accompany you across the full range of work, from vision and values to strategies and structures to execution.

Contact your Pathstone advisor to learn more or reach out to Pathstone's Wealth Planning Group at [WPG@Pathstone.com](mailto:WPG@Pathstone.com).

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