

Generational Wealth Checklist

Your Journey. Your Goals. Your Summit.

Use this worksheet as an educational starting point. Add notes that reflect your household.

☐ **Share age-appropriate financial education**

☐ **Reduce expensive household debt**

☐ **Build emergency reserves**

☐ **Review family protection**

☐ **Review beneficiaries**

☐ **Organize estate documents**

☐ **Discuss values and goals across generations**
