**Pre-Class Survey**

Rev. Date: 1/2020

1. Do you or your family have a written Family Vision Statement? Yes \_\_\_\_\_ No \_\_\_\_\_
2. Does your family have a written list of your Core Values? Yes \_\_\_\_\_ No \_\_\_\_\_
3. Does your family have a formal family rewards system? Yes \_\_\_\_\_ No \_\_\_\_\_
4. Do you know your Spiritual Gift(s) Yes \_\_\_\_\_ No \_\_\_\_\_
5. Do you know the Spiritual Gift(s) of at least two other family members? Yes \_\_\_\_\_ No \_\_\_\_\_
6. Do you have a written household budget? Yes \_\_\_\_\_ No \_\_\_\_\_
7. Are you living a multigenerational lifestyle? Yes \_\_\_\_\_ No \_\_\_\_\_
8. Do you have a written multigenerational household budget? Yes \_\_\_\_\_ No \_\_\_\_\_ N/A \_\_\_\_\_
9. Do you know your family’s net worth? Yes \_\_\_\_\_ No \_\_\_\_\_
10. Do you have student loans with a balance? Yes \_\_\_\_\_ No \_\_\_\_\_
11. Do you have a written plan to pay off your student loan(s)?

Yes \_\_\_\_\_ No \_\_\_\_\_ N/A \_\_\_\_\_

1. Do you have a Family Intellectual Capital Directory? Yes \_\_\_\_\_ No \_\_\_\_\_
2. Does your family have formal family meetings regarding building generational wealth? Yes \_\_\_\_\_ No \_\_\_\_\_
3. Does your family have a family business? Yes \_\_\_\_\_ No \_\_\_\_\_
4. Does your family own real estate (heirs’ property)? Yes \_\_\_\_\_ No \_\_\_\_\_
5. What is your age range?

18 – 25 \_\_\_\_\_ 26 – 35 \_\_\_\_\_ 36 – 50 \_\_\_\_\_ Over 50 \_\_\_\_\_

1. Gender: Male \_\_\_\_\_ Female
2. Ethnicity White \_\_\_\_\_ Hispanic \_\_\_\_\_ African American \_\_\_\_\_

Native American \_\_\_\_\_