



Faith | Family | Friends | Finance | Fitness | Fun | Fulfilment | Freedom

# FAMILY COMPASS

Your family compass is designed to guide your family and each family member to achieving fulfillment, providing a roadmap to Living & Leaving a legacy.

## CORE VALUES

## FAMILY MISSION

## FAMILY TIME/MEETINGS

## FAMILY RULES/GOVERNANCE

Family Constitution: \_\_\_\_\_

Family Assembly: \_\_\_\_\_

## FAMILY GIVING POLICY

(Philanthropy)

## FAMILY GIVING POLICY

(Family)

## BHAG

## FAITH STATEMENT

## VERSE OF THE YEAR

## ANNUAL THEME 2022

## INNER CIRCLE

## FAMILY COUNCIL

## FAMILY TREE

Our Parents: \_\_\_\_\_

Us: \_\_\_\_\_

Children: \_\_\_\_\_

Grand Children: \_\_\_\_\_

Great Grand Children: \_\_\_\_\_

Siblings: \_\_\_\_\_

Nieces & Nephews: \_\_\_\_\_

## FAMILY ADVISORS

Tax: \_\_\_\_\_

Trust/Legal: \_\_\_\_\_

Investments: \_\_\_\_\_

Trustee: \_\_\_\_\_

DLP Prosperity Success  
manager: \_\_\_\_\_



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## 100 YEAR CHECKPOINTS

|                            |  |
|----------------------------|--|
| Wealth:                    |  |
| Income:                    |  |
| Impact & Philanthropy:     |  |
| Friends & Relationships:   |  |
| Family: Living Our Legacy  |  |
| Family: Leaving Our Legacy |  |

## 20 YEAR CHECKPOINTS

|                            |  |
|----------------------------|--|
| Wealth:                    |  |
| Income:                    |  |
| Impact & Philanthropy:     |  |
| Friends & Relationships:   |  |
| Family: Living Our Legacy  |  |
| Family: Leaving Our Legacy |  |

## 5 YEAR CHECKPOINTS

|                            |  |
|----------------------------|--|
| Wealth:                    |  |
| Income:                    |  |
| Impact & Philanthropy:     |  |
| Friends & Relationships:   |  |
| Family: Living Our Legacy  |  |
| Family: Leaving Our Legacy |  |

## FAMILY STRENGTHS

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|--|
|  |
|  |
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|  |

## FAMILY WEAKNESSES

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|--|
|  |
|  |
|  |
|  |

## WHAT WILL WE ACCOMPLISH THIS YEAR? STRATEGIC

|         |  |
|---------|--|
| Goal 1: |  |
| Goal 2: |  |
| Goal 3: |  |

**Questions:** What do you want to IMPACT? What do you want to be remembered for? By who? Do you want your children to never NEED anything? Never WANT for anything?

## WHAT WILL WE ACCOMPLISH THIS YEAR? PEOPLE

|         |  |
|---------|--|
| Goal 1: |  |
| Goal 2: |  |
| Goal 3: |  |

**Questions:** Who will become stewards of your Legacy? Who is apart of your will?

## WHAT WILL WE ACCOMPLISH THIS YEAR? OPERATIONS

|         |  |
|---------|--|
| Goal 1: |  |
| Goal 2: |  |
| Goal 3: |  |

**Questions:** Do you have a family constitution? Meeting schedule? council? Trust & Will up to date? Insurance?

## WHAT WILL WE ACCOMPLISH THIS YEAR? ACCELERATION

|         |  |
|---------|--|
| Goal 1: |  |
| Goal 2: |  |
| Goal 3: |  |

**Questions:** What do we need to do grow or accelerate our Legacy?