THE FAMILY OFFICE SELF-ASSESSMENT

YOUR CONCERNS	YOUR OPPORTUNITIES	YOUR IDEALS
☐ I'm frustrated by "transactional" and "institutional" advisor relationships, and the lack of accountability I've experienced	☐ My advisor team shares my values, understands my priorities and is committed to the long term best interests of my family	☐ I value open honest relationships with my advisors based on accountability and objectivity
☐ My finances are complex and/or disorganized	☐ I am maximizing all of my resources, money, time and relationships	☐ I would appreciate a financial team working on my behalf / as an extension of my family
☐ My business staff is distracted managing my personal finances	☐ I have one central "go to person" I call who oversees my affairs and will manage any financial issue	☐ I am committed to make appropriate changes and willing to delegate
☐ I'm overwhelmed by the combination of my personal and professional affairs – I need to simplify my life	☐ My personal life, finances and business all have the attention they deserve	☐ I know what I want and am committed to achieve it as I continue to learn, create and grow personally
☐ I'm not sure I have the best advisory team	☐ I am confident working with advisors I can trust for the right outcomes	☐ I am willing to place trust where it is deserved
☐ I have no formal, long term plan to achieve an even bigger future	☐ I have a comprehensive long term strategy in place which provides clarity of direction and purpose	☐ I have a future that is bigger than my past
☐ My advisors work in silos so I must coordinate all of their efforts	☐ My Financial Team oversees all of my affairs. I am organized and in control	☐ I believe collaboration yields better results
☐ All of my wealth is concentrated in my business - and it is illiquid	☐ My wealth and lifestyle are stable and sustainable	☐ I have the financial stability to focus my efforts where it will make a difference
☐ I worry about who will manage the finances if something happens to me	☐ My family has a relationship with my "go to" financial team	☐ My family and I have peace of mind
☐ I don't want wealth to spoil my kids and grandkids - I want it to empower them	☐ My children are empowered, talented and successful	☐ I am family centred and know we are stronger together than apart
☐ I'm so busy I don't have time to really enjoy "life"	☐ I am expressing my unique abilities, and am guided by my Financial Team	☐ I see money as a tool, not as an identity
☐ I sometimes feel pressured to make financial decisions without being fully prepared / informed	☐ I have professional support available whenever I need it	☐ I appreciate the benefits of a disciplined approach to financial management
☐ I have no succession plan or exit strategy	☐ I have created an inspired legacy, and am a mentor for the next generation	☐ My generosity, compassion and other values will support future generations
☐ I may be paying too much tax – I'm not sure	☐ My centralized Financial Team is proactive and creative	☐ My wealth management is efficient and cost effective

How many boxes did you check under "Your Concerns"?

0-2... Congratulations - you seem to have your affairs in order! 3-4... We may be able to help "fine tune" things to provide more clarity, direction and peace of mind.

More than 5... We should talk! Helping people like you is our passion. FA has the skills and resources to organize your affairs, optimize your finances and relieve the "burden" of trying to do it all yourself.

If the above resonates with you, we would be pleased to discuss further by phone or in person. Please either call us at (855) 812-2828, or scan your completed form and email to inquiries@firstaffiliated.ca

www.firstaffiliated.ca

First Affiliated
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