

12 PRINCIPLES FOR THRIVING FAMILIES

DEVELOP YOUR PRINCIPLES



Transcend time by sharing your vision (mission, vision, values) to create unity.

INVEST IN A FULL INHERITANCE



Provide a real inheritance that consists of the Five Capitals: Intellectual, Character, Relational, Financial, Spiritual.

HAVE A WRITTEN PLAN



Achieving your goals starts with writing them down and referring back to them often.

DELIVER BLESSINGS



Tell your story by sharing the struggles that made you who you are and allowed you to share your excess with the next generation.

STEWARD NOT OWNER



Gratitude is a known antidote for entitlement. Wealth does not equal identity or security and we should have the understanding that money is a tool not a solution.

DISINHERIT THE IRS



Define your desired financial generosity and give gratitude by understanding the Kingdom vs. world estate plan.

EMPOWER, DON'T CONTROL



Listen and love equally while treating uniquely. Healthy conflict can be good when you maintain neutrality.

DON'T QUIT



Life is about the journey not the destination. Plan for how you want to "re-tire" vs. retire.

SIMPLICITY WINS (K.I.S.S.)



Complexity is the enemy of execution. Simplicity is the key to clarity and efficiency. Find ways to stay in your lane and "Keep It Simple Steward".

EVIDENCE NOT OPINION



News exists to sell ads and generally leads to a cycle of anxiety. Objective data applied to your investments can help you to think long term.

LIFE IS A TEAM SPORT



Surround yourself with wise counsel and mentors. God is the team captain. Listen, support, and enjoy those around you.

HAVE FUN TOGETHER



Celebrate life, success, and failure with those around you.