

(Name) Family Letter of Intent

Purpose

This letter of intent is written for my children and our professional advisors to help them fully understand our stewardship desires, core values and life purposes. It is our intention to maximize our combined family wealth for the benefit of my ___ children and ___ grandchildren, for the benefit of selected philanthropic organizations and for other selected individuals.

How We Obtained Our Wealth

(What is your family story? What has most impacted your decisions regarding the use and distribution of your accumulated wealth?)

Our family wealth was obtained from _____ and held in _____.
Our wealth today was obtained by _____. It is our intention to _____ with our wealth.

Our Beliefs Concerning Finding Meaning and Happiness in Life

(What are your hopes and wishes for your heirs, outside of finances? i.e.) education, life philosophy)

We have been the beneficiaries of many wonderful blessings over the years. We believe true happiness _____. Looking back we have learned _____.
Our hope for the future _____.

Our Responsibilities to Ourselves

(What income are you looking to achieve/maintain annually? For what purposes?)

Our financial desire is to _____. This is intended to _____.

Our Responsibility to Our Heirs

(How much and in what way do you intend to give to your heirs?)

We wish to provide _____, in a way that _____.

Our Responsibility to Others

(To whom and for what purpose do/will you give outside of the family?)

It is our objective to reduce taxes in favor of charitable gifts wherever possible, as long as these gifts do not interfere with our ability to meet our personal lifestyle needs or the needs of our children or grandchildren. We currently give to _____. We would like to continue giving at this same level in the future and at an even higher level, to the extent financial resources are sufficient. We would like to _____.

Above all, our ultimate objective is to _____.

Sincerely,

(Name)

(Name)

Date _____

Date _____