

LEGACY BUILDER COURSE

A 'What Would the Rockefellers Do?' Implementation
Guide and Resource

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Phase I

HOW TO INITIATE A LASTING FAMILY LEGACY

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Imagine one of your great-grandchildren presiding over a family fortune of tens of millions of dollars - or even hundreds of millions of dollars.

And imagine that, whenever your great-grandchild receives a check to help pay for education, or to put a down payment on their first home, or to start a business or even to help survive financial disasters like medical bills, illness or disability, that your great-grandchild gives a quick toast to your memory.

Your great-grandchild toasts to you because you started it all. You amassed wealth and left behind a set of values and a financial legacy to shepherd that wealth.

Is this possible? Is it possible for you to not just leave your kids better off than you were, to leave a heritage, not just an inheritance, and to spark a financial legacy of wealth and empowerment that lasts for generations?

Yes, it is. It's possible to create a family fortune that lives on in perpetuity - benefiting generation after generation after you - and it's possible to do it without creating "trust fund babies" who know how to spend money and little else.

Instead, your life's work and accumulated wealth can be used to empower future generations. It can act as a launching pad for all of their endeavors, whether those are professional, academic, charitable or entrepreneurial in nature.

It's not easy and does take careful planning, but it has been done.

These key building blocks, the Family Legacy Rings, stack the odds in your favor to crush entitlement, invest in your heirs, and live your legacy.

These steps empower you to give your children and grandchildren resources, tools, people, and a structure to thrive.

Enjoy this complimentary guide, and feel free to bring it to your financial team so that you can apply these "building blocks" to your life and business immediately.

Build the life you love,

BUILDING BLOCK #1: CREATE A FAMILY TRUST

A key to securing a financial legacy is in how you live, including planning early and often.

Sam Walton, the founder of Walmart, gifted each of his kids 20% of the business when it was just a small five-and-dime store. Now the Walton children are some of the richest in America, in part because the estate was not split up or taxed heavily when Sam Walton passed away.

So whether you're wealthy today, or plan to be in the future, now is the perfect time to begin. And creating your family trust is the perfect place to start.

Why is a family trust valuable?

A trust will keep your assets out of probate court when you pass away, which is where the whole world gets to watch the courts distribute assets amongst your heirs.

It's public record forever.

And the last thing you want is some lawyer searching for a reason to sue your kids because they know what irresistible assets they inherited. A trust creates privacy that your children will learn to appreciate. *A trust also lets you take control of how your assets are distributed.*

Most probate courts will simply distribute shares of your assets to heirs if they're over 18 (or once they are 18). But a trust can be written to have stipulations, guidelines and incentives to make sure money is only distributed to heirs who are making wise decisions. Or to release portions of the assets over time as your heirs get older and more responsible. Or become a place to borrow money at preferred rates - you get to choose.

Plus, there are potential ways to avoid estate taxes and increase liability protection, keeping the financial predators from confiscating your wealth.

Make it about more than just money with a Family Constitution.

One of the unique elements our clients love is called a "statement of purpose" - also known as a Family Constitution. It is the preamble to your trust, in your words, not legalese. It is the key to passing on more than just money to your heirs.

It's your entire life philosophy and wisdom distilled into one document, which is put in the beginning of your family trust. This allows your trust to be dynamic and gives a platform to capture your values, philosophies, and key insights for generations. Below is a short template that I used as a starting point to write a complete Family Constitution.

How impactful is this document?

To put it into perspective, I have written several bestselling books, and *the most important one was this Family Constitution.*

How you write your Family Constitution is entirely up to you. You can keep it short and sweet like the example below, or expand it into a short book like my wife and I did. The important thing is that when your trust is set up correctly with this Family Constitution, you'll rest assured that you will leave sign posts to avoid costly mistakes, capture key lessons, and add value to your heirs beyond money.

Up next is Building Block #2. Feel free to skip ahead, or read through this 2-page example of a Family Constitution:

Purpose of the Trust

I am establishing this Trust for my primary benefit during my lifetime, for my spouse's benefit and for our children and later descendants thereafter for as long as there are trust assets available to do so. I have created this trust in such a way that it is my intention that it last for future generations and provides assistance to those future generations to live full, happy and complete lives. Due to the fact that this trust, and any subtrusts created hereunder, could go on for a long period of time, I recognize it is impossible, and probably unwise, for me to attempt to plan for every possible contingency that may develop in my descendants' lives, and I don't like the idea of doing so. Accordingly, I have left a significant amount of discretion to successor Trustees hereunder to make discretionary distributions and provide opportunities to our children and future descendants, as those Trustees being in the moment will undoubtedly be better situated to make an assessment of a particular expenditure or benefits being provided to a beneficiary.

However, we are firm believers that what we desire to pass on is true human life value to our children and future descendants. This true human life value is not just money in the bank, but the collection of our life experiences, values, character, philosophies, ethics, etc. We intend to do all we can to expose our children and future descendants to these things and ideas during our lifetime. However, in the event we were to pass away prematurely, or in the case of future descendants we did not have the opportunity to know, we have decided to explain our general sentiment towards many aspects of our lives below.

I desire that whenever possible, the administration of this trust, especially determinations as to benefiting a particular beneficiary hereunder, be done in accordance with my stated purposes as described below, or at the very least in furtherance of my sentiments so expressed herein. I therefore direct that each and every Trustee that serves hereunder shall read and become thoroughly familiar with my stated purposes and make determinations as to distributions to beneficiaries in a manner that, as closely as possible, reflect the sentiments described below.

It is also my desire that our future descendants read this purpose of trust in its entirety and be given a copy thereof when they become beneficiaries hereunder and are able to receive distributions.

We hope that this section will give insight into who we are and what we stood for during our lifetimes. Therefore, my stated purposes in creating this Trust and providing for our children and future descendants are as follows:

1. Health & Fitness: Our greatest happiness does not depend on the condition of life in which chance has placed us, but is always the result of a good conscience, good health, occupation, and freedom in all just pursuits. *"In health there is freedom. Health is the first of all liberties."* - Thomas Jefferson.

2. Intellectual Pursuits: *"Intellectual growth should commence at birth and cease only at death."* - Albert Einstein. We believe if you do what you are passionate about you will be more fulfilled. Whatever type of education is necessary we support. We are happy to pay

for masterminds, courses and events, however we believe paying for something is more rewarding, so you are to pay that money back to your children with insurance so that they have the same or better opportunity than you did.

3. Travel: We have always loved to explore other places, to see and learn about other cultures. We feel you always take something back with you, and best of all, learn to appreciate where you are from.

4. Love: All we can ask for is that you find someone with whom you share the love that we have. Marry for love only. If this is the case and you know you are making the right decision, we support and fully budget your wedding (after age 22).

5. Family: One of our major wishes is that you will want to spend quality time with your family and have done our best to create the right situations to foster this. We are interested in starting traditions, and in case they are not established when you read this, here are a few ideas:

- At a minimum, spend Thanksgiving together being truly grateful, not just eating turkey.
- Spend the week between Christmas and New Years together somewhere to talk about your great wins, challenges, and planning for the next year.

6. Career: (a) Like we mentioned in the past, we would like nothing more than for you to be fulfilled, and that means wanting to get out of bed every day to do what you love. (b) We plan on funding the building of your skills, and if you do what you do well, money will not be a problem, meaning that you can monetize your passion if you are creative. (c) If you go into business, use a coach and make sure that you set it up appropriately so you are protected.



BUILDING BLOCK #2: HIRE YOUR KIDS IN A BUSINESS, OR START ONE WITH THEM

As business owners, teaching our children entrepreneurship can be extremely fulfilling, and can even help reduce your tax burden so you can keep more of your income and put it to good use.

The Benefits of Putting Your Kids to Work

In the US, your company can hire your kids, pay them around \$12,200 or less per year, and in most cases your business gets a write-off that lowers its tax liability.

This strategy works because neither your kids or your household are taxed on the wages, as long as you follow the rules.

Employing your kids also provides several other benefits, including:

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- **Allowing your children to learn the value of work**
 - **Giving them insight into the family business**
 - **Training them in entrepreneurship**
 - **Providing you with a nice tax deduction while giving your family another source of taxfree income**
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Here's How It Works

Each child can earn up to the standard deduction allowed by the IRS and not owe any tax at all. So currently you can pay your child who is under the age of 18 around \$12,200 or less per year and 100% of that income can be tax-free for them.

And since you get to take that as a deduction on your business, you will get a tax break according to your highest marginal rate. This could amount to as high as a \$4,575 tax break for each child you hire.

Now generally, it's a bad idea to spend a dollar to save forty cents. You never want to let the tax tail wag the dog. So if you use this strategy and simply let your children blow the money on candy or video games, it may not be such a great deal. However, there are ways you can make this tax strategy much more efficient and beneficial to both you and your child.

Ways to Make This Strategy Work Even Better

Since you actually have to pay your child for work performed (and not just say you do), set up a separate bank account for each child to have their "paychecks" deposited. Then have the children use this money for all the things you would normally pay out of your own pocket. I added mine to the payroll with auto-deposit.

For example, they can now pay for their own:

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- **Sports or music lessons**
 - **Airfare on your next family vacation**
 - **Clothes, computers or recreation**
 - **Cell phones, including the monthly service**
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In this way, your child develops a realistic sense of how much things cost. It also combats the entitlement mentality that giving your child an “allowance” can inadvertently cause.

It also gives your child a sense of satisfaction knowing they are self-sufficient with many of their own living expenses. The benefit to you is that you end up with less out-of-pocket expenses to provide for items that go above and beyond their day-to-day requirements.

Here are just a few simple ideas to get the wheels turning in your mind:

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1. **Office management including running errands, making coffee, tea or other snacks for employees**
 2. **Actor or model for your website or marketing materials**
 3. **Competitive research on the Internet or updating you on social media trends**
 4. **Product testing and feedback**
 5. **Office building cleaning or simple repairs**
 6. **Business travel companion as support**
 7. **Rehearsal partner for a speech**
 8. **Event support including introducing speakers and especially you**
 9. **Content capture and editing (video)**
 10. **Data entry**
 11. **Appearances in ads (voice, video, etc)**
 12. **Guest on social media marketing content**
 13. **Product testing and feedback**
 14. **Landscaping and/or snow removal for home office or office**
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It's important to note that everyone's situation is different, so be sure to consult with your tax specialist to identify the right course of action for your business and family.

BUILDING BLOCK #3: INITIATE THE ROCKEFELLER METHOD

Would you like to increase your retirement income by 30-40% without disinherit your family?

Would you like your children and grandchildren to have the opportunity to live happy, productive, and abundant lives - without any fear that they'll squander the family fortune you worked so hard for?

It doesn't matter how much of a fortune you have or don't have today. You have the power - right now - to change your family's financial destiny forever.

It's a financial strategy where you combine the raw power of over-funded, Whole Life, cash value insurance with a Family Trust to create something we call the “Rockefeller Method”.

“Keep the Money Together”

In the 19th and early 20th centuries, two of America's wealthiest businessmen amassed incredible fortunes that each separately towered over the fortunes of Bill Gates, Warren Buffett and Mark Zuckerberg combined.

Their names were Cornelius Vanderbilt and John D. Rockefeller.

When Vanderbilt died in 1877, he was the richest man in America, with more money than the US Treasury held at the time. When Rockefeller died in 1937, he was the richest man in US history. Both intended their legacy and fortune be passed on for generations, however, only the Rockefellers still stand today.

The difference?

The Rockefeller family kept the money together using three key strategies that make up the “Rockefeller Method”:

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1. **Design trusts that protect the fortune as much as possible for taxes, lawsuits and spendthrift heirs. Direct how money can and cannot be spent.**
 2. **Own nothing and control everything.**
 3. **Create a perpetual family bank using a Cash Value Insurance policy.**
 4. **Pass along your values so that your vision doesn't stop with you.**
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Setting Up a Family Financial Structure

With a properly set up “Family Trust”, you'll be able to pass on a set of values along with your financial legacy, instead of just a pile of money for everyone to fight over. In your trust, you can specify how, why and when family members access money in the family bank you set up. This empowers future generations to be productive, not entitled.

For example, you can set up a trust where any descendant of your family has the opportunity to use that money for an entrepreneurial program, mastermind program or certain types of education.

In order to access money they would write a plan to the board of the trust, saying, “I'd like to go to this program, and it costs this much money, and I'd like to borrow that money from the trust.” *It is, in essence, a family bank.*

The trust allows this loan due to the investment in education, the expansion of the individual's ability to create value and earn a living, but it is imperative for that individual to have a cash value insurance policy that protects that trust.

What Happens When a Child Is Born

Thirty days after a beneficiary of the trust is born, the trust takes out a life insurance policy, for the maximum amount of insurance a company will offer. That way, if the borrower ever pays the money back, it's not detrimental to the survival of the trust.

They have restrictions on how much they can borrow, and if they are not able to pay it back in full, the trust will be made whole again by the life insurance. And if or when they do pay it back, the interest on that loan is NOT getting paid back to the government or to a banking institution, but back into the family trust, keeping the family strong and profitable

This is one way the Rockefeller family has protected and grown their family fortune while other wealthy families have become paupers in one to two generations.

Here's how to start building your legacy today...

The first step in getting the Rockefeller Method implemented is to set up your own personal Whole Life, cash value system ASAP. It doesn't matter how much you are making right now. You can even start if you're making minimum wage.

Immediate and consistent action is the key to building wealth. You start by creating a separate "sweep" account. This is where your extra money goes.

It's all about "Paying Yourself First" and making it automatic.

So before you pay your bills, before you buy groceries, before you go have fun, ALWAYS set aside a set portion of your income to save.

In other words, ***the first bill you pay each month should be to your personal savings.***

For now, this can be a simple bank account if you want. The important thing is to create an automatic sweep of a set percentage of your income into this account. The percentage can start as whatever you want. I call this process The Value Capital Accounts, beginning with a way to capture wealth through automation and create wealth with a cash value insurance plan.

Right now the amount or percentage isn't important. The key is to start the habit now. The only way to start building wealth is to be 100% committed to paying yourself first.

Why pay yourself first?

Here are three reasons to start paying yourself now instead of waiting until you "have enough":

1. When you pay yourself first, you mentally establish saving as a priority. You tell your subconscious YOU are more important than the water company or the cell phone bill or the landlord. This is a powerful motivator and the key to growing wealthy.
2. Paying yourself first promotes healthy financial habits. Most people spend their money in this order: bills, fun, saving. It's no wonder personal savings are at the lowest levels ever for the middle class. When you set the money aside before you rationalize reasons to spend it, you are adopting the Win Then Play mindset.
3. By paying yourself first, you build a liquid peace of mind fund with real-world applications. In short, paying yourself first gives you freedom - it opens a world of opportunity.

Phase II

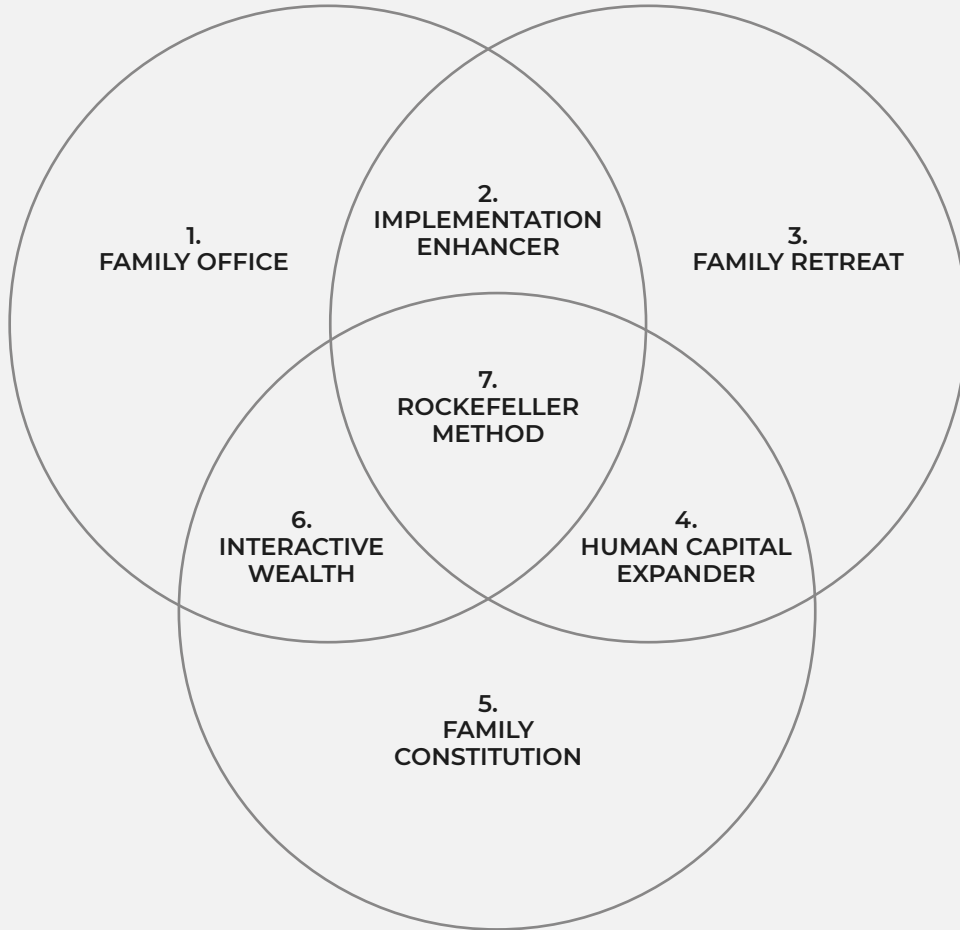
THE FAMILY CONSTITUTION

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THE FAMILY LEGACY RING

This workbook emphasizes one of the three key family components, the Family Legacy Ring. The intention: to stack the odds in your favor to create a legacy that lasts by building your Family Constitution.



1. Family Retreat:

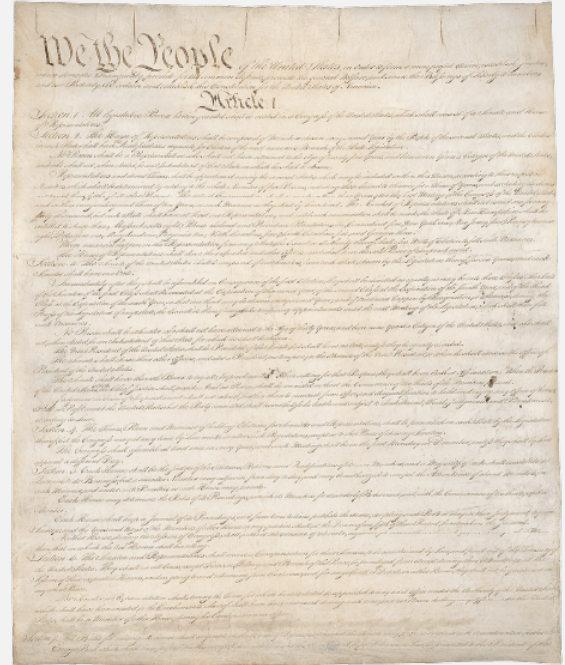
In order to have your estate plan become something your family intimately knows, it requires conversation, structure and living by example. Having regular meetings with agendas, identifying family rules and creating a structure for rhythms and rituals is essential to perpetuate the non-monetary aspects of legacy. Recurring meetings and retreats allow a transfer of philosophy and further creation of family traditions, rituals and insights where these critical factors live in the hearts and minds of your heirs (rather than only on legal documents or solely in your own mind). The meetings, rituals and traditions create space and time for refinement, buy-in (people support that which they help to build), and development of what your family stands for.

2. Family Office:

Steve Jobs, IBM and so many iconic companies attribute A-teamers to their exponential growth and success in business. In finance, the secret sauce is the same. The Rockefellers knew it (6 generations strong), the Vanderbilt family didn't (3 generations money gone). It requires the same philosophy for perpetuating and protecting wealth, an integrated A-team.

3. Family Constitution:

The United States Constitution is the oldest and the shortest written constitution in the world. Its 4,400 words have played a crucial role in limiting government and creating freedom. A carefully crafted Family Constitution is designed to do the same. The purpose of the US Constitution is to protect (not grant) the natural rights of life, liberty, and the pursuit of happiness as contained in the Declaration of Independence and the right to property as espoused by John Locke (The pursuit of happiness replaced property in the Declaration of Independence). A Family Constitution can protect equal rights, not provide equal things. Through proper incentive-based planning, a Board of Trustees, and an articulated philosophy, your heirs can benefit when they are wise stewards over the resources provided but are not entitled to anything if they choose to do nothing.



THE FAMILY LEGACY EVENT AND WORKBOOK

Not one of the Founding Fathers could have come up with the much-needed Constitutional formula by himself, and the delegates who attended the convention knew it. At that very moment the states were bitterly divided. The Continental dollar was inflated almost out of existence. The economy was deeply depressed, and rioting had broken out. New England had threatened to secede, and both England and Spain were standing close by, ready to snatch up the (dis)United States at the first propitious opportunity.

Writing a Constitution under these circumstances was a frightening experience. None of the delegates had expected the Convention to require four tedious months. In fact, within a few weeks many of the delegates, including James Madison, were living on borrowed funds. From the opening day of the Convention it was known that the brainstorming discussions would require frequent shifting of positions and changing of minds. For this reason, the Convention debates were held in secret to avoid public embarrassment as the delegates made concessions, reversed earlier positions, and moved gradually toward some kind of agreement. Even though your Constitution is critically important and essential to your family, you won't be feeling nearly the same pressure.

Your family is an ongoing concern. After you die, there will be heirs. The Family Constitution will be there to protect your legacy and benefit our family for generations to come. The significance of having a Family Constitution can provide massive value to perpetuating, preserving, and protecting your legacy for years to come.

Your Family Constitution may be referred to as a Statement of Purpose inside of your trust. This is used as a guideline, written in your own words, for those that manage and benefit from the trust. Through distilling your core philosophies, articulating your values, and leaving

signposts of your most important insights for generations to come, you can highlight contribution, creation, and connection that has been instrumental in your own success and happiness (to stack the odds in your heirs' favor to live their best life as well).

The limitation with most estate planning is the overemphasis on passing on money tax-free without the proper structure to capture non-monetary assets and human life value that would otherwise be lost.

The legalese that is required for a trust to be properly implemented upon death is only part of what makes this work. Those words are not something your heirs will be inspired to read nor will it leave breadcrumbs, incentives, or ideals that can live on in their life. Adding a Family Constitution allows you to pass valuable information along to the next generation so that just like with money, they're not only learning by mistakes and tough lessons. This allows you to leave behind an intellectual legacy of wisdom, knowledge, and values.



Legacy

How do you define legacy?

What does legacy mean to you?

What are you currently doing to establish and live your legacy?

What contingencies do you have in place to insure your legacy?

What things are you not doing that would be essential to building your legacy?

What are your best practices that you would like to continue to do more of in order to create your legacy?

INGREDIENTS FOR CONSTRUCTING YOUR FAMILY CONSTITUTION

The following questions are designed to extract initial ideas and insights you want to add to your Family Constitution. If you get into flow, there is no need to use these questions. They are here to support the development of your Family Constitution. You will edit and refine later, so forget about grammar or perfection and capture the main ideas.

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- What are the biggest mistakes in your life and what did you learn from them?
 - What have been the most meaningful choices/decisions you have made and what was your process?
 - What are some of your keys for success?
 - What are some of your creeds that guide you in life?
 - What are the most important things you would want future generations to know that have been instrumental in your success?
 - What traditions have served you the most?
 - What have been the most important things you do to live a life you love?
 - What ideas and philosophies were passed down to you by your ancestors that still serve you well?
 - Do you have any formulas that support you in your success?
 - What are the most important things you want future generations to know about you and what you stand for?
 - What things have you done in business that would translate to supporting your family as an ongoing concern as well?
 - If you could leave your heirs with only one thing (not money) what would you want to leave to them?
 - What structures do you have that support your success?
 - What have been the greatest lessons and insights you have from your key relationships and mentors?
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SELECTING YOUR BOARD OF TRUSTEES EXERCISE

Use the following questions to brainstorm several names to choose from that may form your Board of Trustees:

- Who is prudent, resourceful, and a good steward of their money?
 - Who do you consider a lifelong learner- one who enjoys learning and enjoys sharing what they learn with others?
 - If you were going to start a new business today, who would you want to be on your board of advisors (people that you respect)?
 - If you were going to start a new business today, who would you want to be your business partner(s)?
 - Who can give you advice and has already accomplished some of your ambitions?
 - Who do you admire for their ability to create relationships and connect with people?
 - Who are the couples that you really enjoy spending time with and that when you leave their presence you are left with an impression of how much love and respect they have for each other?
 - Who do you look up to in the physical domain of health and fitness?
 - Who has the most abundant attitude and lives a life of prosperity and generosity?
 - Who do you know has overcome great obstacles and specific challenges that inspired you?
 - Who do you count on when in a critical time?
 - Who do you know that has impeccable integrity?
 - Who do you want to influence your kids and family now and when you are gone?
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NOTES



Of all the names you have listed, did any keep recurring?

- 1. _____ 4. _____
- 2. _____ 5. _____
- 3. _____

If you could only keep one name, who would it be?

- 1. _____

If you could keep two, who would it be?

- 1. _____ 2. _____

If you could keep three, who would it be?

- 1. _____ 3. _____
- 2. _____

If you could keep four, who would it be?

- 1. _____ 3. _____
- 2. _____ 4. _____

If you could keep five, who would it be?

- 2. _____ 4. _____
- 3. _____ 5. _____

Phase III

FAMILY RETREAT

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FAMILY RETREAT

The easiest and least fun part of legacy is the part we can delegate—passing on money tax-free. There are great attorneys who specialize in this. The other areas of legacy cannot be delegated, at least if you want your legacy to last. The place where you can start your legacy today, regardless of money, is in family traditions. The experiences that bond, connect and even prepare future generations. These events are where memories are created as well as the conditions that call children to come back on a regular basis even when they have a family of their own or move away.

Part of living your legacy has to do with where you invest your time.

There are three factors that all sustainable businesses or religions have in common. This section of the Legacy Builders Course highlights how you can integrate these into your family to create a legacy that lasts and creates your biggest wins along the way in the form of experiences and living wealthy.

Ingredients to Your Family Meetings

When it comes to creating your legacy, communication is key. All of the documents in the world may not be worth much if they don't translate into the lives of those you love. To avoid entitlement and create opportunity, having a family meeting is key. The following exercise will support you in creating a custom agenda to create these rhythms and habits within your family.

Each family is unique. Some of you are yet to have kids and others have stepchildren or even children who have a family of their own, hence the questions to build something that works for you. I'll even give you the format I use with my family that you can adopt and adapt. This is one of the ways we have been able to create conditions for learning, set goals, and spend quality time together. The following questions will support you in building family meetings that work for you.

Establishing Your Family Meetings



What day of the week and time of the day is best for your family to meet each week?

Day: _____ Time: _____

Notes: _____

Where do you want to meet? How can you keep this consistent? What would stand in your way of this meeting happening?

What are the most important things to discuss in your family meeting?

Examples: What skills are you looking to develop? Where can you use the most support from anyone in the family? What are you most excited about? What would make this week your best week ever? What are you grateful for? What lesson have you learned in the last week? What are you most looking forward to?

Are there any family traditions you would like to create?

Family Retreat



What is the best time of year to have a day together?

What would be the best outcome of a Family Retreat?

What fun activities could be planned to make the day enjoyable?

What are the most important topics you would like to discuss?

What are the most important questions you would like to ask?

My Example

We begin by doing a gratitude exercise: Adults use the 5-minute journal and the kids use the 5-minute journal for kids. We then read our family mission statement, family values, and Gunderson Boys rules (all examples included below).

We rate how we are doing and acknowledge where we are doing well and how we can improve. My family simply uses the Evernote app to capture notes from each meeting. You can use a journal, an app, or anything that works for you.

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- **How am I doing as a father on a scale of 1-10? (Note: If not a 10, what would it take to be a 10?)**
 - **What skillset would you like to advance?**
 - **What is one thing that you can do to support each member of the family this week?**
 - **What trips do we want to take as a family?**
 - **What are some charitable/mission work things we can do as a family?**
 - **What is one family activity we can do this week? e.g. hike, concert, fish, gu s night (with mom)**
 - **What private victory can you have this week? e.g. guitar, hike, work on goals, bike ride, swimming, workout**
 - **What is a Family Goal we can work on?**
 - **Where should we display our mission, our rules? Should we have them designed? Framed? Displayed?**
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Family Crest

Now that you have the basic agenda for your family meetings and a full day (or longer) Family Retreat, let's move to another key component for legacy—your crest.

One of the three components of a great organization is having symbols. In medieval times it was common for families to have crests. In today's world, all businesses have logos. These symbols are visual reminders that can be displayed—on websites, T-shirts and apparel, and even on the walls where these organizations reside.

To begin, pick the values that resonate with you and your family. We had our kids circle five values, and my wife and I did the same. Those that were immediately unanimous were captured. From there we let each person pick the one that was most important to them and say why. It doesn't have to be limited to five. We voted to determine which ones would make the cut.

People support that which they help to build. By beginning with these values, it became a guide to start sketching out our crest. Fortunately, my brother-in-law is an artist, so he sketched the first rendition that is included on the following page. Remember, progress over perfection, and you win when you begin.

Take the list of words on the next page and circle the ones that describe traits of your family. Let each member have a turn to pick some words.

Achievement/Drive	Discovery	Intention	Quality Relationships
Adaptability	Ecological Awareness	Intimacy	Rational
Adding Value	Economic Security	Involvement	Receptivity
Advancement	Effectiveness	Job Tranquility	Recognition (respect, status)
Adventure	Efficiency	Joy	Reliability
Aesthetic	Ethical Practice	Justice	Religion
Affection (love and caring)	Empathy	Kindness	Reputation
Affinity	Endurance	Knowledge	Resolution
Aliveness	Energy	Leadership	Resolve
Arts	Enthusiasm	Learning	Resourcefulness
Attractiveness	Environment	Leverage	Respect
Authenticity	Equality	Life	Responsibility & Accountability
Awareness	Excellence	Location	Security
Beauty	Excitement	Love	Self-Determinism
Bliss	Expertise	Loyalty	Self-Respect
Caring	Expression	Making a Difference	Sensitivity
Certainty	Fairness	Market Position	Sensuality
Challenging Problems	Fame	Meaningful Work	Serenity
Change and Variety	Family	Mentorship	Sharing
Charisma	Fast Living	Meditation	Simplicity
Charity	Fast-Paced Work	Merit	Sophistication
Cheerfulness	Financial Gain	Money/Making Money	Soul
Chivalry	Flexibility	Music	Spiritual
Clarity	Focus	Nature	Spontaneity
Close Relationships	Forgiveness	Nurturing	Stability
Coaching	Freedom	Open and Honest	Strength
Commitment	Friendship	Openness	Status
Communication	Fun	Optimistic	Success
Companionship	Giving	Partnership	Supervising Others
Compassion	Gratitude	Passion	Synergy
Competence	Growth	Patience	Team/Teamwork
Competition	God	Peace	Technology
Confidence	Happiness	Perception	Tenderness
Congruence	Health	Perseverance	Time Freedom
Connection	Heart	Personal Growth	Togetherness
Conscientiousness	Helping Other People	Physical Challenge	Travel
Considerate	Helping Society	Playfulness	Trust
Contribution	Honesty	Pleasure	Trustworthiness
Conviction	Honor	Power and Authority	Truth
Cooperation	Inclusive	Presence	Unity
Courage	Independence	Privacy	Value
Courteousness	Influencing Others	Probability	Vigor
Creativity	Inner Harmony	Productivity	Vision
Decisiveness	Inspiration	Public Service	Vitality
Democracy	Integrity	Purity	Vulnerability
Dependability	Intellectual Status	Purpose	Wealth
Discernment	Intelligence	Quality	Wisdom

Gather as a family and brainstorm a logo or picture that would represent your family. Draw your logo using the white space below, and surround it with the words you chose from the previous page. Use this image as an example.



Mission Statement / Family Creed

Write several paragraphs of what your family stands for and what your Family Creed is. You can use your Family Values List as a good starting point.

Here's mine:

Gunderson Family Mission Statement

We believe you don't get a second chance to live a life you love and build a legacy that lasts. The Gunderson Family legacy is one of gratitude, support and personal responsibility. Gratitude is our fuel for abundance, appreciation, and creating an environment where happiness is the norm.

We look for ways to appreciate all living things, circumstances and lessons - realizing lessons are inevitable and can be tough, emotional, and required for growth. Support is shown by celebrating our differences (divinity of diversity); allowing for unique style, personality and preferences while seeking our similarity through our values, traditions and family rituals. We invest in experiences that bring us close together, looking for excuses to spend time with one another and build memories that last. Date night. Guys night. Cabin trips and summers abroad.

These and other traditions bond us together and must be treated as sacred and a priority. We believe in progress over perfection. When we are frustrated and act out, we are quick to forgive and apologize by listening, seeking to understand, and choosing love, knowing this is part of life (Do-overs). We deeply value self-reliance and responsibility, but use our talents and time to properly train and teach, investing in each other so we can make it on our own, even if we never have to. We do whatever-it-takes to keep the family together and trust that by committing to what matters most it will bring the most fulfillment and love for us all.

Repairing Relationships

The “5-Step Conversation to Relationship Transformation” is a powerful technology for transforming relationships. Because interpersonal communication can be complicated by each party’s perception of the other, the 5-Step Conversation requires that certain elements of the conversation come before others. This helps establish the foundation of the exchange as a non-threatening conversation intended to achieve a specific outcome. The 5 steps of the conversation include:

1. Focus on the assets of the relationship. This would be accomplished by communicating any characteristics that you appreciate and admire in the person.
2. Communicate any liabilities that you have brought to the relationship. This would be accomplished by addressing where you have been inauthentic, out of integrity, or lacked proper communication.
3. Communicate the liabilities that you would like to address that currently leave the relationship in a debt position. These would be the issues that you would like to transform. This would be accomplished by addressing any liabilities that you would like to overcome. It is critical to address your intent for addressing these liabilities and asking the person “How would you handle this if you were in my shoes?”
4. Communicate what excites you about moving forward. This would be accomplished by addressing the possibilities, strategies and commitments that are made as a result of step 3.
5. It is critical to re-address and engage in conversation sometime between 24-48 hours after you initiate the first communication. It is imperative to give the other party a chance to express how they are feeling and what they are thinking since your conversation. Primarily focus on listening. If there are any unresolved issues, repeat the process.

Conclusion

Progress over perfection. Done is better than perfect. Start with the end in mind. What is your intention with approaching a family member to heal or improve a relationship. Have the courage to transform your family’s future and destiny to be one of love and legacy.