

Intergenerational Questionnaire: Creating Pathways

1. Was money discussed at the dinner table when you were a child? Yes ____ No ____
2. Was wealth discussed at the dinner table when you were a child? Yes ____ No ____
3. Did your family make any distinction between wealth and money? Yes ____ No ____
4. Were either wealth or money discussed anywhere in your family (with your involvement) when you were a child? Yes ____ No ____

5. What messages, direct or indirect, did you receive from your mother regarding money?

6. What stories did she tell you about her childhood (about anything)?

7. What do you have that's special from your mother?

8. What messages, direct or indirect, did you receive from your grandmother regarding money?

9. What stories did she tell you about her childhood (about anything)?

10. What do you have that's special from your grandmother?

11. What messages, direct or indirect, did you receive from your father regarding money?

12. What stories did he tell you about his childhood (about anything)?

13. What do you have that's special from your father?

14. What messages, direct or indirect, did you receive from your grandfather regarding money?

15. What stories did he tell you about his childhood (about anything)?

16. What do you have that's special from your grandfather?

17. What is your family's greatest strength? What strength can you see through the generations?

18. Who, among the family members you have known, best exemplifies originality?

19. Did you have an allowance? Yes ____ No ____

20. Were you allowed to spend your allowance? Yes ____ No ____
If yes, were you given any guidance on this, and what was the guidance?

21. Were you encouraged to give time, talent or treasure to make the world a better place?
Yes ____ No ____ If yes, how were you encouraged?

22. Who in your family has shown you the value of generosity?

23. Were you encouraged to save money? Yes ____ No ____

- 24. Was the message you received about rich people positive ____ or negative ____ ?
- 25. Were you required or allowed to earn money before the age of eighteen? Yes ____ No ____
- 26. Were you encouraged to earn money before the age of eighteen? Yes ____ No ____
- 27. What did you learn from earning money when you were young?

- 28. Did you ever have the experience of earning a reward (like a trip or a privilege)?
Yes ____ No ____
- 29. Was your family stoic and self-sufficient, never needing to see a counselor or a consultant?
Yes ____ No ____
- 30. Was it difficult in your family to ask for help? Yes ____ No ____
financial help? Yes ____ No ____
emotional help? Yes ____ No ____

- 31. From whom in your family did you learn kindness?

- 32. Did your family talk about feelings and emotions? Yes ____ No ____
- 33. Who in your family has shown you what a great sense of humor is?

- 34. Who in your family have you seen exemplify optimism?

- 35. Were you raised in a spiritual environment? Yes ____ No ____
- 36. If you answered “yes” to question 35, were there any conflicts between your spiritual environment and the money values in your home? What message did you get from your parents about this?

37. Was the attitude of entitlement (to have a right to do or have something, to qualify, based solely on your own opinion) allowed in your home?

38. Were you taught gratitude by your parents? If so, how?

39. What has been your greatest joy?

40. Does your parents' legacy to you include financial assets? Yes ____ No ____

41. What kinds of assets define your parents' legacy to you?

42. What is the legacy you are creating? For what will you be remembered?
