J.P.Morgan WEALTH MANAGEMENT

Understanding your perspective on family wealth discussions

A reflection tool for every generation

INSTRUCTIONS: Each family member answers individually. Choose the answer(s) that resonate(s) most. Take advantage of a few open-ended prompts at the end that allow for personal reflection. If you are interested in a facilitated conversation with family members, contact your J.P. Morgan advisor or a member of our Family Engagement & Governance team.

You are a: ☐ Boomer (1946-1964) ☐ Gen X (1965-1980) ☐ Millennial (1981-1996) ☐ Gen Z (1997-2012)

SELECT UP TO 2 ANSWERS FOR EACH SECTION BELOW:

What does "family wealth" mean to you?	☐ A source of opportunity ☐ A responsibility to manage wisely ☐ A means to support future generations ☐ A potential source of conflict ☐ Security and peace of mind ☐ A mix of pride and pressure Other:
How do you feel when family discussions about wealth come up?	☐ Comfortable and open ☐ A bit guarded, but willing ☐ Anxious or unsure ☐ I tend to stay quiet ☐ We rarely have those conversations Other:
What is your preferred communication style?	☐ In-person, preferably one-on-one ☐ Facilitated family meetings or group discussions ☐ Casual conversations (e.g. during dinner, while traveling) ☐ In writing – emails, letters, or shared documents ☐ Text messages or group chats ☐ Scheduled calls or video meetings ☐ I prefer not to discuss family wealth topics unless necessary Other:
What values should your family wealth reflect across generations?	☐ Tradition and legacy ☐ Generosity and philanthropy ☐ Education and learning ☐ Entrepreneurship and innovation ☐ Family support and care ☐ Social and environmental impact Other:

Understanding your perspective on family wealth (continued)

SELECT 1:

How clear are you on your current or future role in your family's financial life?	☐ Very clear – I know what is expected of me ☐ Somewhat clear ☐ Not clear – I'd like more guidance or dialogue ☐ Not applicable – I don't see myself in a role yet Other:

OPEN-ENDED REFLECTIONS:

What is one thing that you've appreciated most about how your family has handled wealth or legacy?	I really appreciate...
What is one topic you wish your family would talk about more openly?	I wish we would talk about...

INTERESTED IN A GUIDED SESSION?

Every family has a unique story, and sometimes, all it takes is the right guide to help the conversation move from surface-level to truly meaningful. Our Family Engagement and Governance team specializes in facilitating productive, values-driven conversations across generations. Whether you are just beginning or navigating complex dynamics, we're here to help.

To learn more, or for questions

Please contact your advisor or a member of our Family Engagement & Governance team.