



Greater Gifts
Family Office

Faith and Finance Checklist

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1. Are your decisions in life driven by a purposeful and meaningful motivation?
2. Do your children possess Discernment skills to deal with sudden wealth?
3. Are conversations about money with your loved ones: Free, Full, Faithful, and Fruitful?
4. Are you confident that your Estate Plan addresses your unique family dynamics?
5. Do you have peace about how your Values will be passed on to your descendants? Have you written a “Loving Will”?
6. Will your grandchildren or great-grandchildren know about your story?
7. Do you have a mission statement for your family?
8. Have you maintained physical health and emotional wellness on your path toward financial independence?
9. Do you worry about the presence of faith in your children’s lives as they grow older?
10. Have you considered what God is calling you to do lately?

Call us at 239-275-1122 or email at kevin@greatergiftsfo.com to get started

At Greater Gifts Family Office, our goal is to be your guide on the path to fulfillment. Financial Health is an extremely important component of the Life Wheel. Throughout 35 years of practice, Todd Macke has found that the sole pursuit of financial growth can often lead to a feeling of emptiness or longing in retirement. People can work their entire lives to achieve the world's definition of success instead of their own.

These 10 questions are a starting point to let your Finances become the pathway towards happiness, instead of the obstacle. Our expert team at Greater Gifts will help you complete this checklist and ultimately find balance in your Life Wheel.

Matthew 6:21 – For where your treasure is, there also will your heart be.



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