KAIZEN
FINANCIAL ADVISORS, LLC

Family Wealth Organizer

A guided resource to help organize your family's financial life across generations.

Kaizen Financial Advisors, LLC
4030 Lake Washington Blvd. NE, Kirkland WA 98033 – (425) 321-5800 – www.KaizenFA.com

A Thoughtful Approach to Family Wealth

Building and sustaining wealth is about more than financial accounts and numbers. It reflects the life you've built, the values you hold, and the future you want to support for your family.

This organizer is designed to help bring clarity to your financial life while creating alignment across generations. It serves as a simple, structured way to organize important information, reflect on what matters most, and begin meaningful conversations with the people closest to you.

For many families, these discussions don't happen often—not because they aren't important, but because they can feel complex or easy to put off. This guide is meant to make that process more approachable. It breaks things into manageable steps so you can move forward with confidence.

You don't need to complete everything at once. In fact, this is most effective when approached over time. You might start by organizing your accounts, updating beneficiaries, or simply having an initial conversation with your family. Each step builds on the next.

There is no single "right" way to do this. The goal is progress, not perfection.

As you work through this organizer, you may find that new questions or opportunities arise. That's a natural part of the process. Whether you are just getting started or refining an existing plan, this is a tool to support clarity, communication, and long-term continuity.

To Your Prosperity,

Kaizen Financial Advisors

Quick Wealth Checklist

Each of the following questions are addressed throughout this organizer. As you work through each section, you'll have the opportunity to build clarity step by step. Keep these questions in mind as you go, they can help guide your thinking and highlight areas to focus on first.

- ☐ Do we know where assets are held?
- ☐ Are beneficiaries updated?
- ☐ Have we had a family conversation?
- ☐ Is there a decision-making plan?

What feels most important to address first?

Family Balance Sheet

Assets	Value
Total	*0*

Liabilities	Balance
Total	*0*

Assets - Liabilities = Net Worth ____________________

What stands out to you about your financial picture?

____

____

Where Everything Lives

Asset & Account Inventory

Account Type	Institution	Owner	Beneficiary	Notes

Beneficiary Review

Keeping Plans Aligned

- ☐ Are all beneficiaries current?
- ☐ Do they reflect your wishes today?
- ☐ Do they align with your estate plan?

What needs to be updated?

Who's Who

Key People in Your Financial Life

Financial Advisor ______________________________

CPA/Tax Professional ______________________________

Estate Attorney ______________________________

Insurance Agent ______________________________

Key Family Contacts ______________________________

Who should be included in important decisions?

____

____

____

____

Family Communication

Creating Shared Understanding

What does wealth mean to our family?

What values should guide decisions?

What do we want future generations to understand?

Decision-Making Plan

Creating Clarity and Confidence

Who makes the final decisions today?

Who should step in as needed?

Is there a Power of Attorney in place?

How will responsibilities transition?

Legacy Letter

What Matters Most

This is one of the most meaningful parts of the organizer.

The purpose of a legacy letter is not to be formal or perfect. It's to share what matters most to you in your own words. This can be a powerful way to communicate your values, intentions, and perspective with your family, beyond what is outlined in financial or legal documents.

You may choose to write this as a letter, a series of thoughts, or simple reflections. There is no required format.

As you begin, consider:

- What values have guided your life and decisions
- What you hope your family carries forward
- How you view the role of wealth in supporting their lives
- Any lessons, experiences, or guidance you would want to share

You don't need to complete this all at once. It's okay to start with a few ideas and come back to it over time.

What matters most is that it feels authentic to you.

What I want you to know and carry forward:

Family Meeting Guide

Bringing Everyone Together

Simple Agenda:

- Share goals and values
- Review assets and structure
- Clarify roles
- Open discussion
- Define next steps

Notes:

90-Day Action Plan

Turning Ideas Into Action

Action Item	Who Is Responsible	Timeline	Notes

Staying Connected

We're Here to Help

As you work through this organizer, you may find that certain areas are straightforward, while others raise new questions or opportunities for deeper discussion. That's a natural and valuable part of the process.

Whether you're organizing your financial picture, thinking through next steps, or beginning conversations with your family, you don't have to navigate it alone.

At Kaizen, we regularly help clients bring structure and clarity to these decisions. This includes reviewing key elements of your plan, identifying areas that may need attention, and, when helpful, facilitating family conversations to ensure everyone feels informed, aligned, and comfortable moving forward.

These discussions can sometimes feel complex or sensitive, but with the right guidance, they can also be productive and meaningful.

If you would like support at any stage, whether that's reviewing what you've completed, talking through specific questions, or helping guide a family conversation, we're here for you.

To Your Prosperity,

Kaizen Financial Advisors

Schedule a 30 Minute Meeting
KaizenTeam@KaizenFA.com
Kaizen Secure Upload Link
Kaizen Financial Advisors, LLC