

WHAT KIND OF TRUST WOULD I WANT

A Purposeful Visioning Exercise

The purpose of the ‘What Kind of Trust Would I Want If I Were the Beneficiary of That Trust?’ Exercise is to assist our clients in visualizing the opportunity they have to create a trust that will be “rich” in emotional currency and sustaining in its impact. We want to help the client see they can use the trust as a tool to enhance the lives of their children and grandchildren. This exercise is also useful in helping us assist a client move from a control mentality towards a purposeful mindset.

1. What is the most powerful gift anyone ever made to you in terms of giving you a boost in life or helping you get over a terrible loss or difficult time?

2. What was the kindest gift you have received or the most unselfish act of service you benefited from?

3. Has there ever been a moment or moments in your life when you could have really benefited from a large gift or a family trust fund? What might you have been able to do if there had been such a gift or trust fund come into your life at that critical time?

4. Having reflected on what kind of trust you would like for yourself, what thoughts do you have on what type of trust you want to leave for those you care most deeply about?



5. Pretend for a few moments that you can step back in time thirty years but before you do so you will be given the opportunity to design a trust for yourself which will serve you going forward. What would you like to see in that trust document?

A short but powerful statement from your parent or grandparent about how much they loved you?

A statement from your parent or ancestor about what great potential they have seen in you?

A reflection by your parent or grandparent of the pride or excitement they experienced when they saw you reach an important milestone in your youth or when you accomplished a significant feat in school or life?

A description of the anticipation and joy your parent(s) experienced around your birth and their most cherished memories of your early childhood?

A statement from your parent or grandparent about what hopes and dreams they have about how their gift might enhance your life, allow you to pursue your dreams or goals, or assist you in making the world a better place?

An affirming statement from your parent or grandparent of the faith and confidence they have in your resilience and abilities to overcome adversity or special challenges you'll encounter throughout your life?

Important life lessons or family wisdom which your parent or grandparent think might be of immense value to you or your children throughout your lives or whenever you hit those speed bumps in the road of life?

Are there other things you wish your parent or grandparent might have said in their trust that would have allayed your guilt or fears over what they might have expected you would do with this gift?

