



## CONVERSATION STARTERS

*For each next generation family member to consider before the first succession planning discussion.*

**1. Are you interested in participating in the family operation? ( Yes / No )**

Comment: \_\_\_\_\_  
\_\_\_\_\_

If so, in what capacity?

\_\_\_\_\_  
\_\_\_\_\_

**2. Are you prepared to assume that role/responsibility? ( Yes / No )**

If no, what will it take to prepare for that role/responsibility?

\_\_\_\_\_  
\_\_\_\_\_

**3. Should family members not active in the operation attain/retain an ownership interest in the operation? ( Yes / No )**

If no, how should family assets be distributed?

\_\_\_\_\_  
\_\_\_\_\_

**4. If you want to be included in the operation, are you willing to personally invest in an ownership interest? ( Yes / No )**

Comment: \_\_\_\_\_  
\_\_\_\_\_

**5. What is your biggest question, or unanswered concern, regarding our succession intentions?**

\_\_\_\_\_  
\_\_\_\_\_

**6. Any other succession-related topics you would like to add to the agenda for our upcoming meeting?**

\_\_\_\_\_  
\_\_\_\_\_