

The _____ Family Conference Agenda

1. Devotion
2. Purpose of our Family Meeting
3. Family Rules for every Family Meeting
4. Discovering our Family Values
5. Reviewing What Makes a Successful Family
6. The CHALLENGE
7. Examples of Family Mission/Vision Statements

BIBLICAL TESTIMONY TO PARENTS

"First, I want to give some more biblical evidence for this admonition to parents. The most important text from the Old Testament is Deut. 6:4-9. The most important commandment in all of Jewish Scripture is "Hear, O Israel: the Lord our God is one Lord; and you shall love the Lord your God with all your heart, and with all your soul, and with all your might." Jesus said that was the first and great commandment. And every Jew knew, just like I want every one of you to know, what comes next in this great text. **"And these words which I command you shall be upon your heart, and you shall teach them diligently to your children."** The first assignment a parent has after loving God is to store God's word in his heart and teach it to his children.

John Piper July 25, 1982

ENCOURAGEMENT FROM THE WORD

"Take heed and keep your soul diligently, lest you forget the things which your eyes have seen, and lest they depart from your heart all the days of your life; make them known to your children and your children's children. **Deut.4:9**

"You shall lay up these words of mine in your heart and in your soul...And you shall teach them to your children." Deuteronomy **11:18,19**

"Tell your children of it, and let your children tell their children, and their children another generation." **Joel 1:3**

One generation shall commend your works to another, and shall declare your mighty acts. **Psalms 145:4 ESV**

Let this be recorded for a generation to come, so that a people yet to be created may praise the Lord **Psalms 102:18 ESV**

We will not hide them from their children, but tell to the coming generation the glorious deeds of the Lord, and his might, and the wonders that He has done" **Psalms 78:4**

"And his mercy is for those who fear him from generation to generation" **Luke 1:50 EVS**

"Your testimonies are my heritage forever, for they are the joy of my heart" **Psalms 119:111**

A GENERATION THAT DID NOT KNOW GOD

When Joshua finally disbanded the armies of Israel, the tribes moved into their new territories and took possession of the land. Joshua, the man of God, died at the age of 110 and was buried at the edge of his property in Timnath-heres, in the hill country of Ephraim, north of Mount Gaash. The people had remained true to the Lord throughout Joshua's lifetime, and as long afterward as the old men of his generation were still living-those who had seen the mighty miracles the Lord had done for Israel.

But finally all that generation died; and the next generation did not worship Jehovah as their God and did not care about the mighty miracles he had done for Israel. They did many things that the Lord had expressly forbidden, including the worshiping of heathen gods. They abandoned Jehovah, the God loved and worshiped by their ancestors- the God who had brought them out of Egypt. Instead, they were worshiping and bowing low before the idols of the neighboring nations. So the anger of the Lord flamed out against all Israel. He left them to the mercy of their enemies, for they had departed from Jehovah and were worshiping Baal and the Ashtaroth idols.

¹⁵ So now when the nation of Israel went out to battle against its enemies, the Lord blocked their path. He had warned them about this, and in fact had vowed that he would do it. But when the people were in this terrible plight, **Judges 2:6-15 TLB**

PURPOSE OF _____ FAMILY CONFERENCE

Spiritual

- a. To show our LOVE and RESPECT for each family member of the _____ Family.
- b. To impress upon each family member the importance of knowing Jesus intimately and to encourage each to know and apply God's word.
- c. To encourage each family member to accept the challenge to develop and train the next generation, to leave behind a Godly posterity.

Communication

- a. To understand that clear and loving communication among family members is absolutely necessary for our family to THRIVE. Effective communication is VITAL to the long term health of our family.
- b. Open, honest, genuine and transparent communication leads to TRUST and TRUST leads to TRUTH which leads to LOVE

Challenges:

- a. To candidly discuss the potential challenges and obstacles inherent when you pass wealth to the next generation
- b. To understand that the adversary will do everything in its power to ruin the _____ family, relationally, financially and spiritually

Expectations:

- a. To openly discuss ___(mom)___ and ___(dad)___ current estate plan and to set the expectations of the next generation as to the disposition of their estate
- b. To discuss the roles and responsibilities and expectations of family members

PURPOSE OF _____ FAMILY CONFERENCE (cont.)

Preparing and Equipping:

- a. To recognize God has gifted each family member with unique skills and talents and to celebrate the uniqueness of every family member
- b. To prepare and equip each family member with the tools and skills to manage their careers and the wealth that will be transferred
- c. To promote a forum and an environment that will encourage the attainment of wisdom more than anything else

Family Mission:

- a. To identify the values that shape our family to create a statement that defines who the family is, what the family represents and what the family members desire to accomplish
- b. To identify our family culture, what makes us different? What binds us together? How can we build a healthy culture?
- c. The number one force that will shape our family culture are our family values and beliefs
- d. A family united around a strong set of beliefs and values will be a strong family

The CORNERSTONE VERSE for all _____ Family Conferences will be Ecclesiastes 7:11-12.

"Wisdom along with an inheritance is good, and an advantage to those who see the sun for wisdom is protection just as money is protection, but the advantage of knowledge is that wisdom preserves the life of its possessors."

Purpose of Family Meetings

- * **Promote family harmony**
- * **Define "Success"**
- * **Define the family's values**
- * **Train the next generation in right thinking (Biblical Principles)**
- * **Forum for honest dialogue**
- * **Manage perceptions and expectations**
- * **Clear the air on financial details**
- * **Transfer wisdom**

"Wisdom, like an inheritance, is a good thing and benefits those who see the sun. Wisdom is a shelter as money is a shelter, but the advantage of knowledge is this: that wisdom preserves the life of its possessor" Eccl 7:11

FAMILY CONFERENCE

Family Meeting Rules

How do we as a family create a safe, transparent and positive setting for family communication in our meetings? What are the rules for communicating in our family meetings?

- * Everyone needs to participate! Everyone is important and has ideas
- * We will seek to understand each other and be quick to listen

- * Focus on the issues. Don't get side-tracked
- * We will be direct in our communication

- * Fast is slow and Slow is fast. We will go at the right pace for the family
- * We will be prepared for each meeting

- * Bring grace to each meeting.
- * We will honor each other's comments and will never discourage

- * We are aware of the spiritual battle we are in as a family
- * When we disagree, we will discuss, settle and support

- * We will move towards conflict and use grace and love to resolve
- * We will be serious when appropriate and have fun as well

- * We are all about God's business! We will be serious.
- * We are all about God's business! The _____ family has fun together

- * We will write everything down as to understand that each family meeting brings us closer to our family mission

- * We will honor each other's uniqueness

EXPRESSIVE

Artistic
Artistry
Beauty
Compassion
Connection
Creativity
Excellence
Experience
Humor
Ingenuity
Optimism
Uniqueness
Stars

Inspired
Courage
Empathy
Faith
Generosity
Grace
Gratitude
Kindness
Patience
Thoughtfulness
Trustworthiness
Wisdom
Stars

RESOLUTE

Productive
Achievement
Determination
Entrepreneurism
Health
Independence
Knowledge
Leadership
Productivity
Recognition
Self Control
Strength
Stars

Ethical
Accountability
Forgiveness
Honesty
Honor
Humility
Integrity
Justice
Loyalty
Respect
Responsibility
Sacrifice
Stars

Acting and Creating Mode

Thinking and Believing Mode

WHICH SQUARE RESULTED IN THE MOST STARS?

Artistic, Inspired, Productive or Ethical

LIST YOUR TOP FIVE CORE VALUES

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____

SMITH FAMILY CONFERENCE

Family Values

John Smith	<i>Excellence**</i>	Faith**	Wisdom**	Generosity	Humility
Jane Smith	Humility	<i>Excellence</i>	Faith	Responsibility	Forgiveness
Judy Smith	Wisdom**	<i>Excellence**</i>	Humor**	Ingenuity	Empathy
James Smith	Accountability	Respect	Humor	Connection	Forgiveness
Jeremiah Smith	Humor	Kindness	Connection	<i>Excellence</i>	Gratitude
Jackie Smith	<i>Excellence</i>	Grace	Accountability	Honest y	Humor
Jessica Smith	Humor	Humility	Courage	Accountability	Sacrifice
Jacob Smith	Humor	Faith	Gratefulness	Humility	Integrity

Humor	6
Excellence	5
Humility	4
Faith	3
Accountability	3
Wisdom	2
Connection	2
Forgiveness	2
Grace	1
Gratefulness	1
Gratitude	1
Kindness	1
Courage	1
Sacrifice	1
Integrity	1
Honesty	1
Respect	1
Generosity	1
Ingenuity	1
Responsibility	1
Empathy	1
	40

Grace, Gratefulness and Gratitude could be put together for a total of 3 for that value

After reviewing everyone's TOP 5 FAMILY VALUES, would you change your TOP 5. If so, how?

- 1 Humor
- 2 Excellence
- 3 Humility
- 4 Gratefulness
- 5 Faith

Define a successful family?

Intentional

Pro active

Children have an active relationship with God

Spouses of children walking with the Lord and raising Godly children

The family, children, spouses, grandchildren knowing the truth

Loving God and Loving others and trusting God

Courage to face conflict and the grace to resolve it

Martin's Spurgeon comment on "carving your heart"

Being a wise and excellent steward of what God has provided

Experiencing peace with all family relationships

Honoring your parents

Loving and accepting of each other as God has made them uniquely

Having fun as a family

For the family to know when and who to share the Gospel with

The Smilth name carries weight and influence. We must steward this blessing wisely

Define an unsuccessful family?

They compromise truth

Easily led by the world

Carry offenses and grudges

Lack of forgiveness

Not accepting of others

Not transparent

Lack of communication

Disunity

Selfish lifestyles

Conflict unresolved

Idols made of their children

THE CHALLENGE

Fu bu guosan dai	"Wealth does not pass three generations"	Chinese
Quien no lo tiene, lo hac; y quien lo tiene, lo deshace	"He who doesn't have it, does it... and he who has it, ruins it"	Spanish
Pai rico, fiho noble, neto pobre	"Rich father, noble son, poor grandson"	Brazilian
	"From clogs to clogs in only three generations"	UK
	"Shirtsleeves to shirtsleeves in three generations"	USA

One of the most comprehensive studies on preparing heirs was completed in 1994 by author Roy Williams. They studied 3,250 affluent families and confirmed 65-75% of estate transitions "fail" were due to the following causes:

- a. 60% were due to breakdowns in trust and communication within the family unit
- b. 25% were caused by inadequately prepared heirs
- c. 12% were due to lack of a family mission or purpose statement that clearly defines the use of the family wealth
- d. 3% or less were caused by incompetent advisors, lawyers and accountants

THE GOAL

"You can't leave character to a trust account. You can't write your values into the will. You can't bank traits like courage, honesty and compassion **in** a safe deposit box. What we need is a plan- a long term strategy to convey our convictions to the next generation"

Tim Kimmel

A.E. Winship wrote "Jukes versus Edwards" in 1900

Jonathon Edwards Generational Intentionality

- a. More than 100 lawyers and 30 judges
- b. 13 college presidents
- c. More than 100 professors
- d. 60 physicians
- e. 3 senators, 3 governors, members of congress, 1 VP of US 75
Army/Navy officers, 1 comptroller of the US
- f. 100 clergymen, missionaries and theological professors

"Wisdom along with an inheritance is good and an advantage to those who see the sun. For wisdom is protection just as money is protection. But the advantage of knowledge is that wisdom preserves the lives of its possessors"

Ecclesiastes 7:11-12

Couples' Values Exercise

When our identity and security are rooted in Christ, money becomes something we manage well for His purposes. Money becomes a tool available for our use to accomplish those things God has placed on our hearts (as informed by His Word). As we gain clarity about the values we seek to live by, making wise money decisions becomes easier. Our values are the foundation for our stewardship and thus guide our decisions about money.

Through skillful and godly wisdom is a house (a life, a home, a family) built, and by understanding it is established [on a sound and good foundation], And by knowledge shall its chambers [of every area] be filled with all precious and pleasant riches.
Proverbs 24:3-4 (AMPC)

Values are our assessment of what's important in life, which ultimately guides how we manage today.

I. Husband & Wife Values

Complete this section individually.

When I think about managing the financial resources God has entrusted to us, what's most important to me?
Write your own words or select from the word list below and rank from least important (left) to most important (right).



- | | | | | | | |
|----------------|---------------|----------------|------------|---------------------|--------------|----------------|
| Accountability | Contribution | Dynamism | Family | Humility | Patience | Simplicity |
| Accuracy | Control | Economy | Fitness | Independence | Peace | Strength |
| Achievement | Cooperation | Effectiveness | Freedom | Ingenuity | Perseverance | Structure |
| Adventure | Courtesy | Efficiency | Fun | Intelligence | Piety | Success |
| Assertiveness | Creativity | Empathy | Generosity | Intuition | Practicality | Support |
| Balance | Curiosity | Enjoyment | Goodness | Joy | Preparedness | Teamwork |
| Belonging | Decisiveness | Enthusiasm | Grace | Justice | Reliability | Temperance |
| Calmness | Dependability | Equality | Growth | Leadership | Resourceful | Thankfulness |
| Cheerfulness | Determination | Excellence | Happiness | Legacy | Restraint | Thoughtfulness |
| Commitment | Devoutness | Expertise | Hard Work | Love | Security | Traditionalism |
| Community | Diligence | Exploration | Health | Loyalty | Self-control | Trustworthy |
| Compassion | Discipline | Expressiveness | Holiness | Making a difference | Selflessness | Truthfulness |
| Consistency | Discretion | Fairness | Honesty | Obedience | Sensitivity | |
| Contentment | Diversity | Faithfulness | Honor | | Serenity | |

Couples' Values Exercise

II. Discuss as a couple:

1. What stood out to you about my values list?

2. How are our values similar? How are they different?

3. Are there any areas where you feel your values are being challenged?

4. How does this values conversation impact our family's goals?

5. If we fully embraced these values, what will our life look like 10 years from now? How is God directing our steps?

Smith Family Mission Statement

WHAT IS A FAMILY MISSION STATEMENT

- * It is the reason a family exists; Its purpose! It is the family's compass! It defines success!
- * It is the family's vision as to where they want to be in 10,20 and 50 years
- * It reflects what the family VALUES
- * It reflects what PRINCIPLES will govern the family
- * It reflects what the family STANDS FOR, BELIEVES and where the family is going together
- * It will guide the family as to how they want to live every day as a member of the family

EXAMPLES

QUESTIONS TO CONSIDER

- 1 What are our strengths, gifting and talents? In other words, what are we good at? Uniqueness?
- 2 What do we believe as a family?
- 3 What can we improve as a family? As Individual's?
- 4 What are the principles that we want to follow as a family?
- 5 What does our family love to do together?
- 6 How do we serve each other as family members? How do we serve others outside our family?
- 8 What words describe our family today?
- 9 What would others say about our family today? What do we want them to say about them in 30 years?
- 10 What characteristics do we want to see in our children and children's children?
- 11 Where are we going as a family? What are our priorities?

FINE TUNE (Fine tune your answers above to 7 Top Priorities)

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____
- 6 _____
- 7 _____

CREATE A SHORT SLOGAN/PHRASE (This captures what the Smith family is all about)

- 1 _____

CORE VALUES (Bring them to life using VERBS)

1	HUMOR	HUMOR IS EVERYTHING _____
2	EXCELLENCE	EXCELLENCE IS A CHOICE _____
3	HUMILITY	_____
4	GRATEFULNESS	ALWAYS BE GRATEFUL _____
5	FAITH	LIVE OUT YOUR FAITH _____
6	ACCOUNTABILITY	_____
7	WISDOM	_____

HERITAGE of the Smith FAMILY

1. A strong work ethic
2. Do what you love and are good at and you won't work a day in your life
3. Love and respect your family members and your spouse
4. See accountability and wisdom from others
5. Love God and love others
6. Manage your money wisely and in balance and trust God for his provision
7. Be generous with ministries you are passionate about
8. Be generous with others
9. Understand the principle of Limited Sphere of Influence
10. Understand that this is your temporary home and your eternal home is your permanent residence