

## Family Meeting Questions

*"Questions, more than answers, have the power to change our lives. Questions bring you into a world of successful decision-making." - Hildy and Stan Richelson*

The stage is now set. The family have committed to a meeting. Further, the initial homework has been done with everyone completing their [Financial DNA<sup>®</sup> Profiles](#), [Family Quality Life Review](#) and other pre-meeting exercises.

Remember, there are a lot of settings for a family meeting. Further, there are a lot of times when key questions can be asked. Questions can be asked during meetings with professional advisors, whilst on vacation, over dinner at the family home or in more formal settings such as during a family retreat.

The issue is now what questions will be asked at the family meeting? What questions will be asked by the family members of each other? What questions will be asked by the independent facilitator or family advisor? This is where good preparation is needed based on understanding the different motivations and attitudes of each family member. Where are the similarities and differences? Where can agreement be reached and what might cause (more) conflict?

The nature of the questions asked and by whom will somewhat depend on the issues and the situation of the family. However, asking questions is not only about getting the subject matter right. You also need to remember your intention when asking the question, the tone in which it asked and your overall emotions. Are you intending a positive result or a negative result? What is your energy for the situation? All of these matters will affect the outcome. So, a good deal of reflection is needed before hand.

A very powerful book to read is [Change Your Questions, Change Your Life](#) by Marilee Adams, PhD. This book provides an excellent foundation for learning to frame your questions in the right way to get the best outcomes. The book really helps you get into the right mindset so that you can ask yourself positive questions (which is the starting point whatever your role or position is) and then others. Also, you will learn the impact of asking more judgemental questions which can lead to a negative outcome, if not disaster.

Further, in preparing for the meeting, you can review our book [Family DNA - Powerful Questions for Families](#). This sets out all of the questions to start family

discussions, address specific issues and focus on the family members based on who they uniquely are in an appreciative way. Our goal is to help you ensure the questions are generally open-ended, positive and appreciative. This will ensure that the family communication can remain strong even if there is disagreement over an issue.

Foundational to the health (or level of dysfunction) of most family relationships is their relationship to money. Even if a family is functioning fairly well you will find many differences under the surface which all trace back to this one issue. We believe it is important that a family meeting does not start out with “money” questions because of the emotions that can get triggered but at some point the questions must get there. So, what is your first memory of money? What are your belief systems about money? Where did those beliefs come from? Who in the family has strongly influenced your beliefs and why? What does money mean to you? How has money impacted your family life? What is the importance of money to your family? What is the purpose of money for your family? How would you like your family remembered?

Again, how these questions are asked will influence the outcome. Some family members will feel safer than others which will depend a lot on who they are, their own life journey and how they perceive their family life.

### ***Guidelines for Family Meeting Questions***

Whether you are a family member, advisor or an independent facilitator, in preparing yourself to ask questions at a family meeting, then consider the following guidelines:

1. With respect to the Financial DNA Profiles, ask questions based on the strongest factor scores for an individual, and then for the family members in areas where there is the closest similarities and greatest differences. These areas will generally be of the greatest interest and are more likely to generate conversation.
2. Consider your intentions in asking a question. Do you have a positive purpose?
3. Ask open ended questions as far as possible.
4. Ensure the questions are positive.
5. Ensure the first few questions are not directly money related.
6. Recognize each person will handle a question so far, and do not push them beyond their limit. Observe for negative emotions and road-blocks.

7. If a person gets emotional, give them space and steer the discussion away.
8. Do not be didactic by imposing your moral intent or slant.
9. Respect a person's space and do not put words in their mouth.
10. Keep it fun and allow some humor when asking questions - laughter will build trust.

Also, remember that your own emotions can be triggered by the responses to a question and may cause you to process your own life. So, it is important that you have also thought about the questions you ask in the context of your own life. This makes asking them more powerful particularly if you are a facilitator.

If you would like more assistance with family meetings and understanding family dynamics, please contact us at [wealthmentoring@financialdna.com](mailto:wealthmentoring@financialdna.com)

For more insight into this topic, please refer to Hugh Massie's book "[Family DNA - Powerful Questions for Families](#)".

#### **Other Recommended Reading**

["Change Your Questions, Change Your Life"](#) by Marilee Adams, PhD

**Visit the DNA Behavior for Families Website:**  
<http://www.dnabehavior.com/families>