# Next Steps

We've reviewed our COREreport.... now what?
Next steps in Resourcing What You Value: COREnology Homework

**Step One:** Let what you have learned sink in.
Ruminate about the values and culture discussions you have had. Take time to review the report again. Continue to talk about core values and culture.

**Step Two:** Think and Plan
Think about financially resourcing your values, then write out your ideas.

1. Which "resourcing options" from the report resonate with you? Why?
    a. Choose one or two of the options shared in the report or come up with your own.
    b. Focus only on one or two, so you can think about them comprehensively.
    c. Clearly articulate your "why."
    d. What personal or shared core values connect to this option?
2. How can our family resource this option now and in the future?
    a. What financial opportunities can our family provide now to help us grow, build experiences, create cohesion, etc.?
    b. What measures do we want to consider to ensure our family values are resourced for the next generations?
    c. As you steward your family's legacy and financial means, it helps to consider an opportunity-based model rather than a consumption-based model. How can you promote the following opportunities for future generations:

i. Purpose: Successful family members know who they are, what they value, and what they believe, and they understand those same things about their family.
ii. Perspective: Successful family members experience a full spectrum of life, both in their communities and around the world, and they understand that circumstances are unique.
iii. Preparation: Successful family members are provided with meaningful education, tools, and resources to understand how to manage and oversee financial resources.
iv. Participation: Successful family members are actively participating in providing services as part of the family, have age-appropriate responsibilities, and earn funds for their needs.

**Step Three:** Family Discussion

Schedule time to discuss how to resource your values.

1. Set a time to talk about Step Two, Part 1.
    a. Select a note taker.
    b. Each person shares one or two resourcing options.
    c. Note areas of unity.
    d. Come to a consensus on what options to flesh out further.
2. Set a different time to talk about Step Two, Part 2.
    a. Select a note taker.
    b. Looking at the consensus options:
        i. What decisions should we make that allow our family to resource these things now?
        ii. What priorities can we lay out to ensure future generations have opportunities to enjoy these resources?
        iii. How might we practically create opportunities for future generations to enjoy purpose, perspective, preparation, and participation?

**Step Four:** Meet with David York
You have considered your values and created a vision for resourcing those values. You have discussed principles for putting your values and vision into practice. David will help you to finalize this work into a values-based financial plan.

**Example:**
Our family completed COREnology, and one consideration for resourcing our shared values was a legacy home. This option was appealing because it felt like a practical, achievable goal for honoring our shared family values of connection, loyalty, responsibility, and wisdom.

We decided to purchase a beach legacy property because our family has fond memories of beach vacations. The trust provided the down payment and will cover expenses, including a property manager. Our extended family commits to an annual one-week vacation at the property together, fostering connection and creating memories. We also commit to one work weekend a year to help maintain the property.

Individuals can use the property as desired, reserving time via the property manager. The property manager will rent the house when not in use, and the funds will be used to cover maintenance costs.

Future generations will gather at the legacy property for the annual reunion, and they will also be able to use it individually. This home will be a spot where we intentionally discuss and explore our family values. Future generations will be taught to contribute to the upkeep of the property, participating in the annual work weekends.
The property can be sold, but only if the proceeds are used to purchase another legacy property that better meets the family's desire to honor our values of connection, loyalty, responsibility, and wisdom.