

HOSTING FAMILY REUNIONS

Strengthen Family Bonds Through Memorable Gatherings

	YES	NO
1 Have you discussed the idea of a reunion or event with key family members to gauge interest and support?	<input type="checkbox"/>	<input type="checkbox"/>
2 Do you have a clear vision or theme in mind that reflects your family's unique culture or values?	<input type="checkbox"/>	<input type="checkbox"/>
3 Have you selected a date and location that is accessible and realistic for most attendees?	<input type="checkbox"/>	<input type="checkbox"/>
4 Do you plan ahead with enough lead time to coordinate travel, lodging, and scheduling details?	<input type="checkbox"/>	<input type="checkbox"/>
5 Have you considered food, entertainment, and activities that will engage multiple generations?	<input type="checkbox"/>	<input type="checkbox"/>
6 Do you have a budget in place and a plan for sharing costs among participants if needed?	<input type="checkbox"/>	<input type="checkbox"/>
7 Have you created ways to document the event—such as photos, video, or memory books?	<input type="checkbox"/>	<input type="checkbox"/>
8 Do you ask for input from family members to make them feel included in the planning process?	<input type="checkbox"/>	<input type="checkbox"/>
9 Have you thought about incorporating traditions, storytelling, or rituals into the gathering?	<input type="checkbox"/>	<input type="checkbox"/>
10 Are you prepared to handle challenges with flexibility, patience, and a focus on connection?	<input type="checkbox"/>	<input type="checkbox"/>

QUESTIONS? CONTACT YOUR FINANCIAL ADVISOR



THE CENTER FOR
RETIREMENT READINESS

What Your Answers Might Mean:



7–10 Yes Answers: You Are Creating Meaningful Family Experiences With Care: Your thoughtful planning ensures that your gatherings build joy, legacy, and lasting family unity.



4–6 Yes Answers: You're On The Right Path But Still Have Work To Do: You've made a great start—refining your plans and involving others will help make your events even more successful and inclusive.



0–3 Yes Answers: You May Be At Risk And Need To Take Immediate Action: Without preparation or engagement, events may fall short—now is the time to organize with purpose and build lasting family traditions.