Family responsibilities — meeting brief

Prepared

Next review

Main concern / decision

What family members want to keep doing

What someone else should own

Decisions the family / trustee must retain

Need, deliverable, and frequency

Responsibility	R / O / N / ?	Deliverable / frequency
Investment oversight		
Tax & estate coordination		
Reporting & reconciliation		
Bill payment		
Governance		
Privacy & access		
Succession & backup		
Accountability & follow-up		

Highest-priority handoff

Task / entity alias

Performer / authority holder(s)

Coordinator / accountable owner

Reviewer / backup

Handoff accepted / capacity evidence

Completion evidence / escalation route

Stress prompts

Ordinary month — work exposed / owner

Urgent tax + liquidity + legal event — capacity

Usual coordinator absent — authority / backup

"I do not know what may be missing" — assessment question

Compare the same brief

Current arrangement alias

Candidate A / model

Candidate B / model

Candidate C / model

Models may include a dedicated family office, multifamily office, existing advisers with an explicit coordination mandate, or named hybrids. No model earns coverage by its label.

Required task / scope / cadence	Current	Candidate A	Candidate B	Candidate C

In each candidate cell name performer, authority, coordinator, accountable owner, reviewer, backup, handoff acceptance, capacity, coverage state, evidence/date, exclusion, and next question. Use page 4 when the cell is too small.

Proposal questions

1. Who performs, authorizes, coordinates, owns remediation, and checks completion?
2. Which entities, branches, accounts, deliverables, and frequencies are included?
3. What remains with family, CPA, attorney, trustee, or another provider?
4. Which employees, affiliates, subcontractors, retained specialists, and backups deliver the work?
5. Who can access data or release payments, and how is access revoked?
6. What happens when work is late, wrong, disputed, or the usual coordinator is absent?

Unassigned or unconfirmed work

Task / consequence	Follow-up owner	Date	Disposition / reason

Costs, transition, and next action

Common currency / period

Required scope reference

Arrangement	Recurring direct	Embedded	Known recurring economic	First-year	Family hours / month
Current					
Candidate A					
Candidate B					
Candidate C					

Unpriced, contingent, excluded, and foreign-currency items

Why any total or comparison remains incomplete

Ongoing and first-year differences, only if comparable

Retained → added → removed → overlap / exit → target bridge

Transition

Records owner / export / data portability

Account movement needed? Why / authority?

Permissions / nonportable items / deletion

Deadline owner during overlap / reconciliation before exit

Backup and successor test

Exit charge / annual minimum / unknown

Meeting close

System owner / backup

Next conversation / owner / date

Accepted limitations and reasons

Documents / evidence to request

This worksheet organizes questions and user-entered information. It does not determine legal authority, verify providers, or recommend a structure.

Task / candidate continuation

Task ID / domain

Arrangement / candidate alias

Requirement / deliverable

Cadence / due trigger

Entity / family branch scope

Performer(s) / delivery mode

Authority holder(s) / basis status / reference

Coordinator / named handoff

Accountable owner for remediation

Completion reviewer / completion evidence

Backup / urgent-work capacity / test date

Handoff accepted by / status / evidence date

Coverage: included / separate / referral / excluded / unclear

Evidence status / reference / date / recheck

Exclusions and work remaining elsewhere

Question / next owner / date / disposition

Authority basis: documented / reviewed by family; awaiting review; unknown; or not applicable with reason. Accountable owner tracks follow-through and does not gain legal authority or liability through this record.

Cost / replacement continuation

Cost ID / arrangement ID

Payee alias / charge / linked task IDs

Layer / recurring or one-time / period

Exact / range / unknown / N/A reason

Amount or low–high / currency

Pricing type / hours / rate / base / base definition

Measurement date / annual rate / tier method

Tiers / minimum / floor or additive

Inclusion mode / parent cost ID

Credit ID / cap / period / method / order

Evidence reference / status / effective dates

Payable by / payer scope / tax treatment unknown

Replaces cost IDs / replaced task IDs

Scope match / replacement evidence

Old end / new start / overlap / termination charge ID

First-year amount / proration / minimum treatment

Assumptions / unknowns / continuation reference

Retained baseline amount / confirmed reduction

Actual duplicate bills both count; duplicate descriptions of one bill do not. A task replacement does not cancel the old invoice until same-scope replacement, agreement end, and any retained amount are evidenced.