

The Relationship T-Sheet Awareness Exercise

Grab a notebook and make three columns. For families, the left-hand column is a list of everyone who touches your wealth (financial, legal, tax, real estate, business advisors). For advisors, it is a list of your top 20 client families. In the next two columns, unpack your status quo, and aspire to those private alternatives. Below is an example.

Family's Relationship T-Sheet

<i>Name (individual, firm)</i>	<i>How things have always been</i>	<i>Permission to question</i>
Alex, the Attorney	Super smart, yet I often don't understand the problem or the recommendations.	All my life I've been an exceptionally strong problem-solver. I'd like to feel included in the whys and hows.
Ivan, the Investment Advisor	He's an A+ player, who lends cachet and confidence.	What is the definition of an A+ player? Is it my definition, my buddy's, or someone else's with different asset levels and priorities?
Sally, the Certified Public Accountant	Gratitude to her and her firm for that once-a-year blood bath on my personal and business tax filings.	Their firm can't possibly stand in the shoes of my wealth. If I was more engaged, what would I discover and how much would I save?



Learn more at CaretoKnow.info

©2025 Strazzeri Mancini, LLP. All Rights Reserved.

The Relationship T-Sheet Awareness Exercise

Advisor's Relationship T-Sheet

<i>Name (individual, firm)</i>	<i>How things have always been</i>	<i>Permission to question</i>
Evan, the Engineer	We suffer through the additional modeling and the incessant skepticism.	Maybe we can discuss his learning style, and what he craves to make a confident decision. Or maybe, there is a different path to feeding his needs that works for both of us.
Neil, the Never-Has-Time	We have a thirty-minute window and it's often cancelled at the last minute. My team preps and re-preps the same minutia. It's exhausting for all of us.	Perhaps we can share the commitment we have made to the relationship, and what our teams are doing behind the scenes. This may allow him to see the impact of his actions on our firm and see if he cares.
The Three-Generation Gyroscope	We want to be more directly impactful with the second and third generations. However, families often won't let us get that close, and we feel powerless.	Maybe we can set a specific conversation to explain why this work matters, and how we might partner with the family to preserve their long-term connectivity as a family. If we are not comfortable raising the topic, who will?



Learn more at CaretoKnow.info

©2025 Strazzeri Mancini, LLP. All Rights Reserved.

The Relationship T-Sheet Awareness Exercise

<i>Name (individual, firm)</i>	<i>How things have always been</i>	<i>Permission to question</i>