

## Pre-engagement Survey

How many generations are old is your family business/enterprise?

Is the family business still majority-owned by the family?

Does your family employ a family office?

How many generations are currently actively involved in management of the family business?

Does your family's youngest generation intend to join the family business?

In what industry is your primary business? (Multiple responses allowed)

What are your family business's approximate annual revenues?

How many employees do you have?

What do you perceive as the biggest issues your family is facing? (Top 3 to 5 issues)