



OFW-003: Generational Wealth Family Workbook

A practical workbook for Filipino families to break cycles of scarcity, align financial goals, and build intergenerational wealth through structured planning and shared responsibility.

1. Family Financial Snapshot

Income Sources	Monthly Amount	Notes

2. Expense Mapping

Expense Category	Monthly Cost	Essential or Non-Essential

3. Family Financial Goals (1–10 Years)

Goal	Target Amount	Timeline

4. Family Asset Plan

Asset Type	Initial Investment	Expected Income	Owner/Manager

5. Contribution & Responsibility Plan

Family Member	Contribution	Role

6. Family Financial Agreements

Write agreed rules on spending, saving, and supporting each other:

7. Monthly Wealth Tracker

Month	Savings/Investment Added	Asset Income	Notes