



Sharing family stories across generations

Wells Fargo Family & Business History Center

History as a tool of wealth education

Family history is often overlooked as a component of wealth education, stewardship, and planning. Yet talking about history with family members across generations can help facilitate a deeper understanding of the past, encourage an intergenerational perspective, and sustain your family legacy now and in the future.

“Successful families tell and retell the family’s most important stories.”

Charles Collier, *Wealth in Families*

Five recommendations for sharing your family history

1. What's in a name?

Tell your children stories about their names — first, middle, and last.

- Were they named after someone special?
- How was their name chosen?
- What is the ethnicity of their surname?

2. Celebrating traditions

Explore the experiences and memories that hold the most meaning for you, your children, and your grandchildren.

- What are your favorite traditions?
- Are there special foods and activities that your family enjoys together?
- Are they faith-based? Related to your heritage?
- Do any of them include places that are important in your history, such as a family home or a beloved retreat?

3. Passing down family treasures

Consider and convey the meaning beyond some of the stories and objects you treasure.

- Do all of your family members know the “who and how” of your family’s wealth?
- Do you have an archive documenting your family and/or business history?
- Are historic photographs or objects related to your family or business story on display in your home, office, or online?
- Have you made provisions to pass down treasured heirlooms to current or next generation family members?

4. Telling your own story

Family history is not only about your ancestral roots, but also your own life story.

- Do rising generation family members know stories from your childhood, school years, and family and working life?
- Have you communicated openly about the roles and responsibilities you’ve fulfilled?
- Has your family history and life story informed your financial education activities with family members?

5. Connecting history, values, and giving

History can help individuals and families clarify their core values — in the past and present.

- Does your family have a mission statement?
- Does your family’s mission statement reflect your history and/or values?
- How do you live these values through the way you allocate your time, effort, and money?

Discover more

To learn more about the Wells Fargo Family & Business History Center, please contact your advisor.

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