Heir: Capital Assessment Worksheet

If you are a couple we recommend completing this worksheet separately. Download a second copy to print out by scanning the QR Code, or visiting **TrusteeServicesGroup.com/5-capitals-worksheets/**

NAME _____

This exercise will help you discern how to best structure your gifts for the people most important to you, as well as discern their readiness or ability to receive.

For each person identified below, please grade your level of concern when considered in the light of the five "capitals". If you are married and intend for your spouse to benefit please list them but do not rank them.

A = No concern • B = Little concern • C = Concern • D = Great concern

NAME OF HEIR	Financial Capital	Social Capital	Personal Capital	Spiritual Capital	Intellectual Capital
	A Good with money. Financially solid. ⌄ **D** Financially irresponsible.	**A** Solid relationships and network. Considerate of others. ⌄ **D** Lacking good relationships. Selfish.	**A** Good character and reputation. ⌄ **D** Poor character and reputation.	**A** Strong faith or religious practice. ⌄ **D** No faith or religious practice.	**A** Educated. Knowledgeable. Wise. ⌄ **D** Uneducated. Lacking good sense.

An honest evaluation of your heir(s) is important to the well-being of the individual and your legacy.