TFB Legacies Consulting

Founder Interview and Biography Process Guide

This process guide will help you to have a successful interview with your relative. The interview is the first step towards creating a founder biography. The founder biography is a key component to a Family Bank website. It helps future generations learn about and feel connected to their family members and to understand why the Family Bank matters.

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Interviewing Your Relative For A Founder Biography

A founder biography is meant to help future generations to connect to their relatives who they did not have a chance to meet in this life. As you ask the interview questions and write the biography, think about how best to capture your relative's life experience, advice, and personality as if to introduce them to their future descendants. It is important for future generations to understand why their relative wanted to start the family bank.

Process

Interview

1. Reach out to your relative to schedule a time for the interview.
2. *If they prefer in person,* bring a device with storage to record the audio (any voice recorder app will work. Try to reduce background noise and position the microphone close to the speaker(s).
3. *If remote*: use zoom to schedule a call and send an invitation a few days ahead of time. Ask your relative to try using the link to make sure they can see the "meeting will start when host joins" screen
4. Start the meeting, hit record. It will automatically transcribe so you don't need to take notes unless you want to. Go through the questions in a conversational manner, asking follow-up questions as needed. You can skip questions if you feel they aren't relevant or they've already been answered.
5. Once you've gone through the questions, stop the recording
6. Explain that you'll turn the transcript into a biography and that you'll share a copy for them to approve.
7. Give them a way to contact you in case they want to add anything they forgot to mention during the interview.

Creating a transcript (in person recording)

1. Upload your file into Grain or other transcription service
2. Correct any obvious errors from the transcription
3. Download the transcript
4. Follow the steps to turn your transcript into a bio (minus the zoom related steps)

Accessing your transcript and creating the biography

1. Log into your zoom account, click on the Recordings tab on the left vertical menu bar. Click on Cloud Recordings to see a list of your recordings. Click on

a recording and download it. You'll get a zip file with the video mp3 file and a .vtt file. The .vtt file contains your transcript.

2. Log into Chat GPT 4. Attach the .vtt file. Ask the AI to remove the time stamps. This will shorten your transcript
3. Copy and paste the transcript into Word or another text editing platform. Cut sections from the transcript that won't fit well into a biography (ex. Long tangents or conversation not about the biography).
4. Rephrase or edit mistranscribed sections for clarity. Your goal is make the transcript easier for the AI to understand, not word for word perfect.
5. Upload your edited transcript, ask the AI "Can you write a 1000 word biography emphasizing the values, life lessons and advice that [name of the grantor (s)] wanted to pass on.
6. Take the generated bio and copy and paste it into a document.
7. Edit it to remove filler words and replace summarized sections with specific anecdotes, details etc that make it feel more unique. The AI mostly knows how to summarize and uses too many filler adjectives.
8. Send it to the grantor for comments and review

Questions

1. What were your financial and life circumstances growing up?
2. What values did your parents teach you as a child that you've carried with you?
3. What was your first job, how did you start your career?
4. Can you describe the course of your career, education, and major accomplishments and milestones?
5. Were there unexpected opportunities that you took in your career and where did they take you?
6. What lessons have you learned over the course of your career?

7. What setbacks or hard times have you had that you hope that your descendants can avoid or learn from?

8. How have you learned to manage your money? Are there particular experiences that have taught you the importance of financial responsibility?

9. What traits or habits have made you successful?

10. If you had a friend or a close family member describe you, what would they say about you? (if you can ask someone close to you to share an anecdote that describes you, that would also work)

11. How has being a parent changed you or changed your outlook?

12. What do you want most for your children and grandchildren?

13. What advice would you most like for your descendants to hear?

14. What would you want future descendants who you won't meet in this life to know about you?

15. Why did you want to start the family bank?

16. Is there anything else you'd like to add or anything we missed?