PagnatoKarp
Transparent Family Wealth Advisors

FAMILY EXPERIENCE

Guiding your wealth decisions **across generations**.

Family Governance

Help establish, provide guidance, and/or execute plans for your:

- Family vision, mission statement and shared family values
- Governance for decision making
- Letter of wishes
- Philanthropic Objectives

Family Dynamics

Design sessions and facilitate interactions for:

- Multigenerational family meetings
- Building family member bridges for different personalities and perspectives
- Family legacies, to help you tell your story, share your wisdom, and pass along lessons learned

Family Education

Coach you and your family to thrive:

- Next generation education (financial and life IQ)
- Family member coaching to overcome obstacles, build upon strengths, and achieve goals
- Personality profiling (e.g., Myers Briggs, StrengthsFinder, etc.) to help each family member understand their natural wiring and strengths

Sudden Wealth Counseling

Prepare you and your family pre and post liquidity events, such as:

- Selling your business
- Inheritance
- Divorce
- Insurance settlement

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