

## 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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