



## 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