



Family
Legacy...
Today and
Tomorrow

Legacy



Designing Legacies



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*The transition between generations and the dynamics within an extended family require a balance between family harmony and the multigenerational continuity of a business or of family wealth. We have worked with hundreds of families guiding them through these challenges and opportunities, and have developed a **multi-phased process** to build and strengthen another generation of success.*

IDENTIFYING COMMON PERSPECTIVES:

Using our **Assessment Tool Process™** we prepare a comprehensive overview of the critical issues and questions that are most significant for your family by **pinpointing the strengths** that your family will draw upon to overcome the roadblocks to your success. The Assessment Tools guide the focus of our individual interviews to uncover your hopes, dreams, concerns, and strengths to help your family design a lasting legacy. We have Assessments for intergenerational family business transitions, sibling teams, partners and family wealth dynamics.

TRANSFORMING FAMILY COMMUNICATION:

To be successful families need to foster new patterns of communication based on adult relationships. **The Family Council™** nurtures and sustains **healthy family relationships** while promoting responsible, committed and active stewardship of all the family's assets including its legacy of values.

ENHANCING LEADERSHIP ACROSS GENERATIONS:

Successful families need highly effective and competent leaders. Our **Forums for Family Business™** are roundtable peer groups dedicated exclusively to the life-cycle career stages of families in business: emerging leaders, young presidents and majority owners. Through individual coaching and peer group interaction we support the **leadership development and personal goals** of individual family members as well as non-family executives.

CREATING STRATEGIES FOR FUTURE SUCCESS:

For families-in-business and families of wealth, the family goals and objectives must **reflect the values of the family**, respond to the forces in the market place and the world, and reflect the competencies and passions of the family members. **Strategic Visioning™** links the family's values and mission with objectives for the family enterprise, family philanthropy, and the management of family wealth.

BUILDING RESPONSIBLE OWNERSHIP:

Family members must work together to define their mutual relationships through an effective **system of governance**. Often, your professionals do not coordinate their recommendations with the other advisors to meet the goals and values of your family. We facilitate your **multidisciplinary team of advisors** to create a collaborative and integrated plan for the future by developing your **Family Constitution™**.



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