

For Families  
of Wealth...  
Today and  
Tomorrow

Designed for  
**FAMILIES  
OF  
WEALTH**

Family

# Family Wealth Dynamics Assessment



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**QUICK** Identify critical issues quickly  
**ORDERLY** Attack problems in an orderly way  
**FOCUSED** Pinpoint land mines and roadblocks  
**MEASURED** Twelve critical success factors

**COMPLETE** Forty-five page interpretative report  
**RELIABLE** Independent research for validity  
**PRIVATE** Internet based with SSL security

