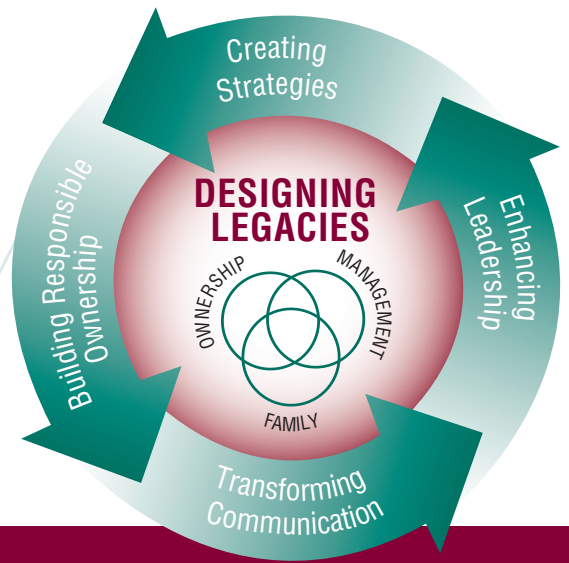




For Families
in Business...
Today and
Tomorrow

Legacy



Designing Legacies



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The transition between generations and the dynamics among siblings and cousins require a balance between family harmony and business success. We have worked with hundreds of families-in-business 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 **Family Business Assessment Tool™** 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 Tool guides the focus of our individual interviews to uncover your hopes, dreams, concerns, and strengths to help your family design a lasting legacy.

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-in-business 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 BUSINESS SUCCESS:

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

BUILDING RESPONSIBLE OWNERSHIP:

As shareholders, 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™**.