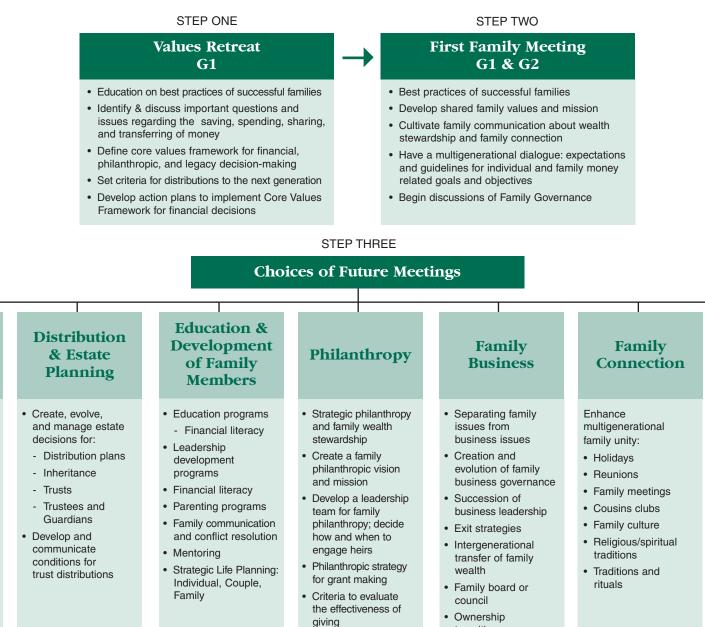
Money, Meaning and Choices: Ongoing Family Meeting Process



Interface of philan-

planning

thropy and legacy

Philanthropic legacy

Teach leadership skills

transition

Estate planning

employees

Business legacy

Family vs. nonfamily

Heritage Planning

Legacy &

- Wealth creation story
- Family history
- family tree
- Passing on: lessons learned, greatest hopes for children, important people and stories, inspirations
- Documenting
 intentions
- Ethical will

 Family decisionmaking

Governance

- Clarity on the roles, rights, and responsibilities of members
- Develop policies and procedures (voting rights)
- Develop family meeting structures:
- Family council
- Family assembly
- Engage and empower the next generation