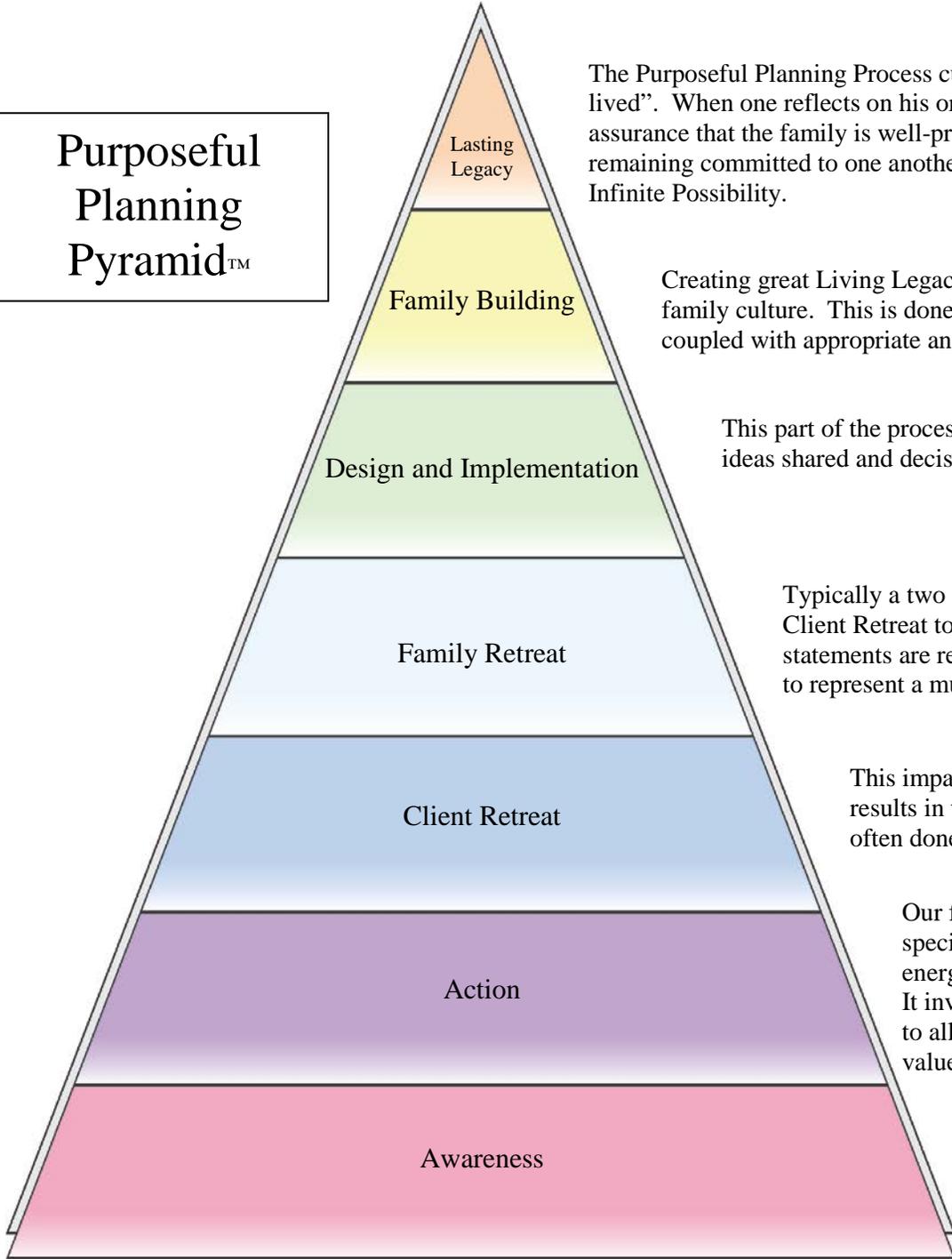


**Purposeful
Planning
Pyramid™**



The Purposeful Planning Process culminates in the creation of a Lasting Legacy that represents a “life well lived”. When one reflects on his or her life, there is a deep sense of satisfaction, pride and peace. There is assurance that the family is well-prepared to carry on the roles and responsibilities of family wealth while remaining committed to one another and to their meaningful philanthropic causes. It is a Lasting Legacy of Infinite Possibility.

Creating great Living Legacies requires a commitment to intentionally creating a strong, supportive family culture. This is done through creating lifelong learning opportunities for the entire family coupled with appropriate and ongoing guidance and mentoring from the senior family members.

This part of the process now integrates legal, tax and financial strategies and tools based on the ideas shared and decisions made during the retreat process.

Typically a two day process, the most valuable Family Retreat expands the content of the Client Retreat to include other family members. Here the Purpose and Vision draft statements are reworked to include all perspectives. The Family Money Tree also evolves to represent a multi-generational plan.

This impactful 6 hour process clarifies values, beliefs and guiding life principles, and results in the creation of the draft Purpose, Vision and Family Money Tree. It is often done with the generation who created the family wealth.

Our full potential can only be reached if we commit to take action. Action specific to the Purposeful Planning Process includes an investment of our energy, time, money and unique talents. It is about introspection and openness. It invites a willingness to engage in a process that “makes the tent big enough” to allow for both conflict and cooperation, for our differences as well as shared values and beliefs.

The people that benefit most from the Purposeful Planning Process are those described as seekers, lifelong learners, consciously aware. The process is designed for those who desire to make a commitment to growing themselves and their families as they strive to define and reach their full potential – individually and collectively.