



WHAT IS A VIRTUAL FAMILY PROGRAM?

A ten hour investment of your time over the course of a year that will pay dividends to your family for decades. A Virtual Family Program is interactive, educational, and can make a huge positive impact on your family and its LEGACY.

VIRTUAL FAMILY PROGRAM

EFFECTIVE. CONFIDENTIAL. INSPIRING.

Life certainly has no shortage of challenges. As a financially successful family, those challenges require a unique set of skills in order to overcome them. Below are the most frequent challenges and questions that our clients grapple with everyday. Our business is your family and we are here to educate and enable you to thrive across the generations.

How do I avoid raising entitled children?

How and when do I begin having the family wealth discussion?

How do I not only transfer my wealth, but also my values to my children and grandchildren?

PROGRAM OUTCOMES

Through a few well orchestrated discovery calls, we can craft an agenda for your program that will not only be educational and full of engaging activities, it will also give you the tools to:

- Set a family vision and live it out fully
- Help with philanthropic planning
- Improve family decision-making skills
- Empower the next generation
- Answer life's difficult questions

"You have been instrumental in guiding our family to a higher place. You are talented, thoughtful, and full of good practice ideas. You have made our family better."

-Ultra High Net-Worth Family

[SCHEDULE A CALL WITH US HERE](#)