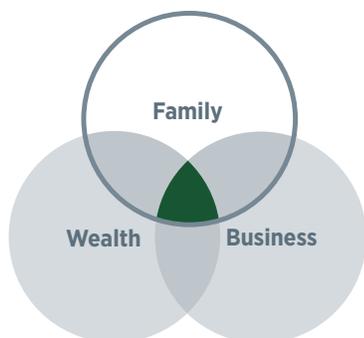


Emerald Family Office & Advisory

PROVIDING STRATEGIC
TRANSITION PLANNING
AND SOLUTIONS



Our holistic approach to planning seeks to integrate and align your family, wealth planning, and business goals to help prepare you for life's transitions.

Holding a Family Legacy Meeting: 20 Reasons to Consider a Gathering

Preserving your legacy through shared learning, communication, and leadership development

Planning a family legacy meeting facilitated by an objective third party can help foster communication, build a plan for leadership succession, and set a path for financial literacy. Our goal is to give your family the tools it needs to help sustain your legacy for multiple generations.

You might need a family legacy meeting if:

1. As a matriarch or patriarch, you have not disclosed details of your estate plan and other wealth structures to your children, and you are not sure how to proceed
2. Your family is searching for some other way to create engagement beyond the review of the family assets/investments
3. Your family has a family bank or is considering establishing a family bank for future business investments, but there is no structure to this process
4. Your family does not have a formal mentoring policy in place
5. Your family needs guidance on college selection and funding possibilities
6. Your family owns a shared property and its use is beginning to present squabbles instead of harmony
7. Your family is tied to mutual investments/assets, and there is disagreement on the future direction of these resources that calls for a third party to help resolve this conflict
8. Your family is attempting to discover a greater purpose on matters of productivity
9. Your family is struggling to connect the dots between accomplishments and failures of previous generations and how these lessons matter today
10. Your family has a significant heritage and history, and you are not sure how to pass those stories on to the next generation
11. Members of the family have varied competencies and understanding of financial matters
12. Your family has not placed equal time and intention on caring for the assets along with caring for the relationships
13. As parents, you want to begin promoting healthy conversations about wealth

Continued



Contact us to learn more about scheduling a family meeting

Please contact:

14. Your family is considering establishing a private foundation or a donor advised fund, and you are not sure how to proceed
15. As parents, you want to share your philanthropic values with your family while also encouraging them to pursue their own charitable interests
16. Your family owns a company, and you do not have a family employment policy in place
17. Your family owns a business, and you want to establish a business advisory board to bolster business prowess and family continuity
18. Your family owns a business, and your succession plan is not defined, or is defined, but many adult members of the family are not aware of the details
19. Your family owns a business, and your shareholder agreement is not defined or is defined, but many adult members of the family are not aware of the details
20. Your family would like to establish a formal family council, and you are not sure how to proceed

Benefits of holding a family meeting facilitated by a third party

Our goal is to have you leave the experience with a vision for what is possible for your family, a deeper understanding of one another, and a path forward for what you hope to achieve together.



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