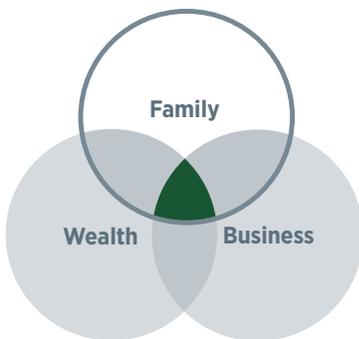


# Emerald Family Office & Advisory

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.

## Family Legacy Planning

Preserving your legacy through learning, communication, and leadership development

Wealth can bring vast opportunities to families, but also many challenges. These challenges are often compounded when there's a family business involved. If you put your family first, your planning may be able to reach the lasting legacy you envision.

As part of our integrated offering for families with complex needs, our family legacy planning services may 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.

### Do you have productive and important conversations with your family?

- Are you fostering open channels of communication that will motivate, not demotivate, your heirs when they receive their legacy?
- Have you prepared your family for the wealth they will inherit?
- Do your family members have the skills necessary to manage their wealth?
- Have you created living and breathing family policies that can mitigate future challenges?

### What does Wilmington Trust Emerald Family Office & Advisory provide?

Many of our professionals have experience helping generations of families work toward finding the answers they need, and creating solutions for challenging and complex issues. Multigenerational educational programs can create family learning opportunities that promote the responsibilities of managing and stewarding wealth. We can work toward refining your family legacy plan by identifying gaps and presenting opportunities for improvement. Follow along a curated family educational series or select a workshop à la carte:

#### Family educational series

- Family Alignment Journey
- Putting the "Family" in your Family Business
- Generational Family Philanthropy
- Career and Education Planning
- Wealth and Financial Literacy

Continued



## Contact us to learn more about our Family Legacy Planning process

Please contact:

### Customized à la carte workshops

- Developing a Family Council
- Enhancing Family Communication
- Family Mission Statement and Motto
- Developing Family Leaders Through Mentorship
- Developing a Family Shared Property Policy
- Family Lessons Through Failure
- Crafting a College Planning Roadmap
- Crafting a Career Path
- Developing a Family Business Board
- Developing a Family Employment Policy
- Best Practices for Family Foundation Management
- Multigenerational Philanthropy
- Reflecting on the Purpose of Money
- Sustainability of Wealth
- Creating your Budget
- An Introduction to Investing
- Economics 101

### Benefits of holding a family workshop

Our goal is for you to 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.

### How does this work with other solutions?

Family Legacy Planning complements many of our other Emerald solutions. By providing financial education and more open dialogue among family members, we can help you prepare to share your family's wealth transfer and other succession plans.



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The specific services provided to you and fees for those services are described in our Platform Enrollment Agreement with you and subject to the Emerald Family Office & Advisory Terms and Conditions. Enrolled Emerald platform clients pay a one-time platform assessment and on-boarding fee in addition to the platform access fee. Please see the Platform Enrollment Agreement between you and us and the Emerald Family Office & Advisory Terms and Conditions for a detailed description of the services provided to you, the fees for those services and terms and conditions.

Family Office services, which include personal and entity financial management and tax preparation, are subject to additional fees and are not part of but in addition to the base Emerald platform services. Tax preparation services may be offered on a limited basis to existing entity or personal financial management clients in accordance with the Platform Enrollment Agreement for those services between such clients and Wilmington Trust.

If advisors or other third parties require compensation, any such fees are in addition to the fees charged by Wilmington Trust.

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