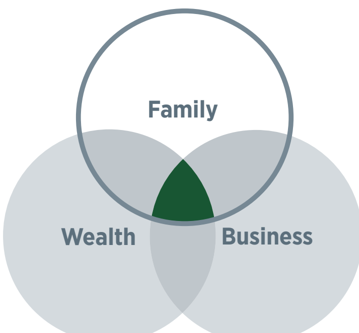
WILMINGTON TRUST

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 achieve the lasting legacy you envision.

As part of our integrated offering for families with complex needs, our family legacy planning services 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 and Advisory provide?

We have decades of experience helping generations of families find 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 will work to refine 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

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.

Please contact:

Marguerite C. Weese, J.D., LL.M.
National Director of Family Legacy Planning
215.419.6561
mweese@wilmingtontrust.com

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MEMBER OF THE M&T FAMILY