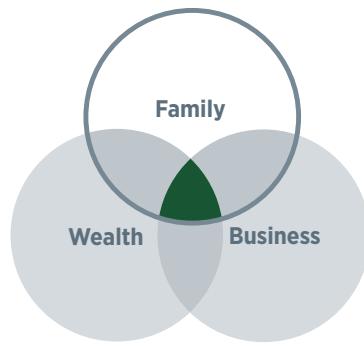


Emerald Advisory Services

A STRATEGIC WEALTH
PLANNING EXPERIENCE



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 Readiness Planning

Preserving your legacy through learning and communication

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 engagement services help foster communication and education, build a philanthropic vision, and plan for succession. 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?
- Have you created learning opportunities for your family on the skills necessary to manage their wealth?
- Have you discussed how your family can use philanthropy to create a lasting legacy and family cohesiveness?
- Is your family emotionally and educationally prepared to take over your business?

What does Wilmington Trust Emerald Advisory Services™ 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 pathway or select a workshop a la carte:

Family educational pathways

- 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 the Wilmington Trust Emerald Advisory Services Family Readiness Planning process

Please contact:

Customized a 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

Charitable giving strategies:

While giving is driven largely by passion for the causes and the institutions you support, making tax-efficient gifts could be an important part of your charitable strategy.

How does this strategy work with other strategies?

Family Readiness Planning complements many of our other Wilmington Trust Emerald Advisory Services. 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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