

# Legacy Planning Part 3 of 3: How Strong Families Survive Tough Times

Ideas and actions advisors can use to help families now.

***The Six-Step Process to Successful Family Governance***

***Endowing Success in the Estate Plan with a F.A.S.T.***



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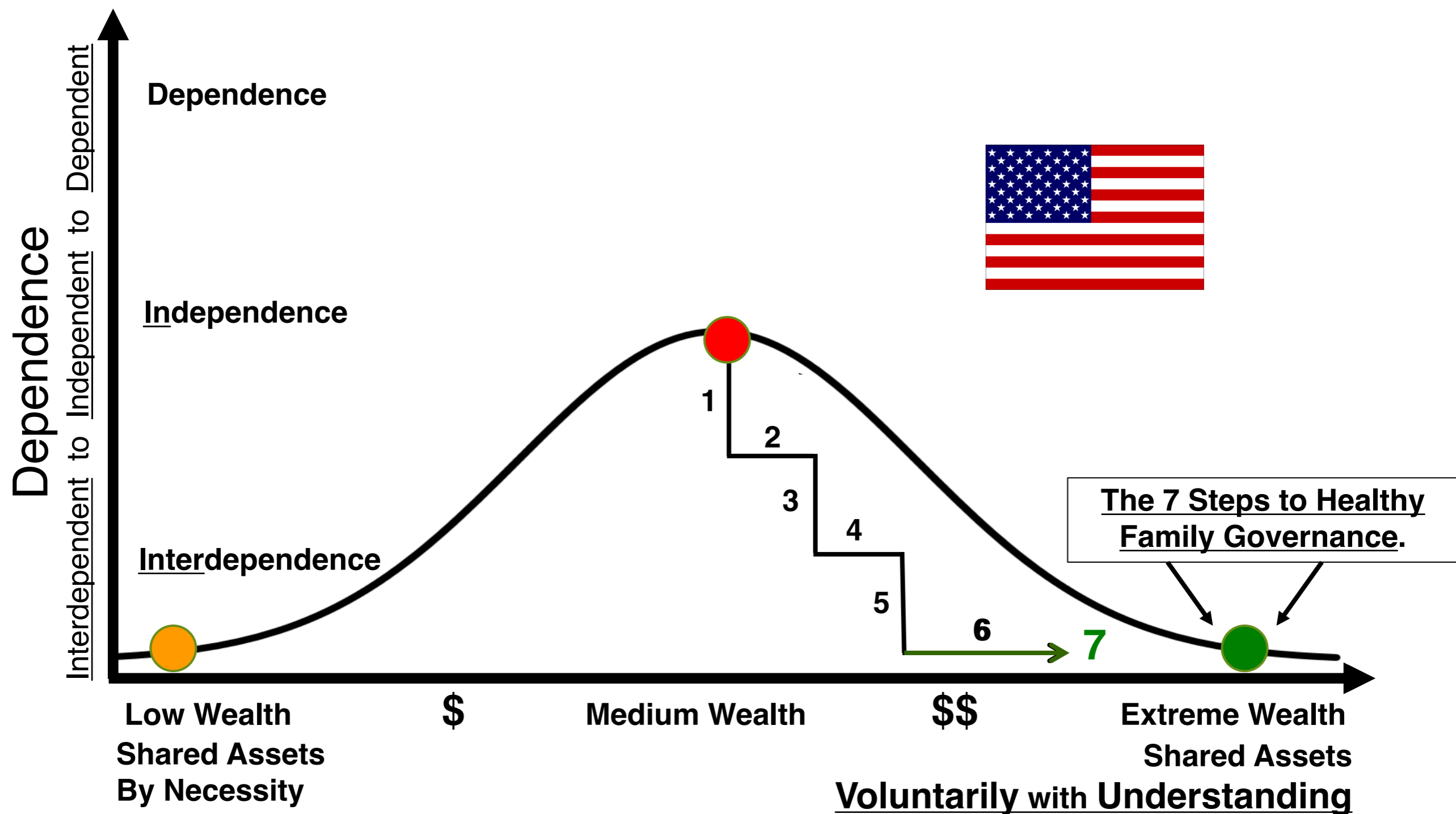


# About GenLegCo.

- ▶ 30 Years of experience preserving families and their wealth
- ▶ Worked with 260+ successful multigenerational families
- ▶ Studied an additional 200+ families
- ▶ Proven “7 step to Healthy Family Governance” process to assist families with communication, philanthropic vision, legacy planning, succession, and education

# “Education” What’s Going On With Families?

## Independence vs. Interdependence



**“... We mutually pledge each other our  
Lives, our Fortunes and our sacred  
Honor.”**

**Thomas Jefferson**

**Interdependence  
(being part of something bigger)  
brings Resilience, Grit and Freedom.**

# Connection Creates Interdependence and Resilience

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**“I’m not a river or a giant bird that soars to the sea, and if I’m never tied to anything, I’ll never be free!”**

**Pippin**


**To know and to be known.**

**To love and to be loved.**

**To trust and to be trusted.**

**Does this bring “Resilience?”**

# Seven Steps to Healthy Family Governance

- 
7. Advancement - An Endowed Continuum of Healthy Family Governance and Succession - Collaboration with other advisors to align the Assets and Estate Plan to the Family Purpose.
  6. Action - Practice Governance and Leadership: “The Ties That Bind”  
Family Entrepreneurial Mindset, Family Philanthropy, Family Bank, ...
  5. Conflict Management - Empathic Communication to Deal with, Practice and Manage Conflict vs. Avoiding Conflict - Relationship Building and Renewing.
  4. Values, Vision, and Mission : “Words to Definitions to Stories” - To Know and to be Known, To Trust and to be Trusted, To Love and to be Loved -  
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“Lifelong Learning Together” - Creating a Family Curriculum
  1. Assessment - Setting the Foundation “Where are we now, where do we want to be, and are we improving over time?”

# GenLeg Co., Inc. Mission Statement



**Family Structures Assets**

Creating Generational Legacy

**“A cord of three strands is not easily broken.”**

**Our Passion and Mission is to:  
Intentionally introduce and reintroduce a  
family to itself repeatedly, with tools, activities  
and metrics to create and measure success.  
“To Educate, Motivate and Facilitate!”**



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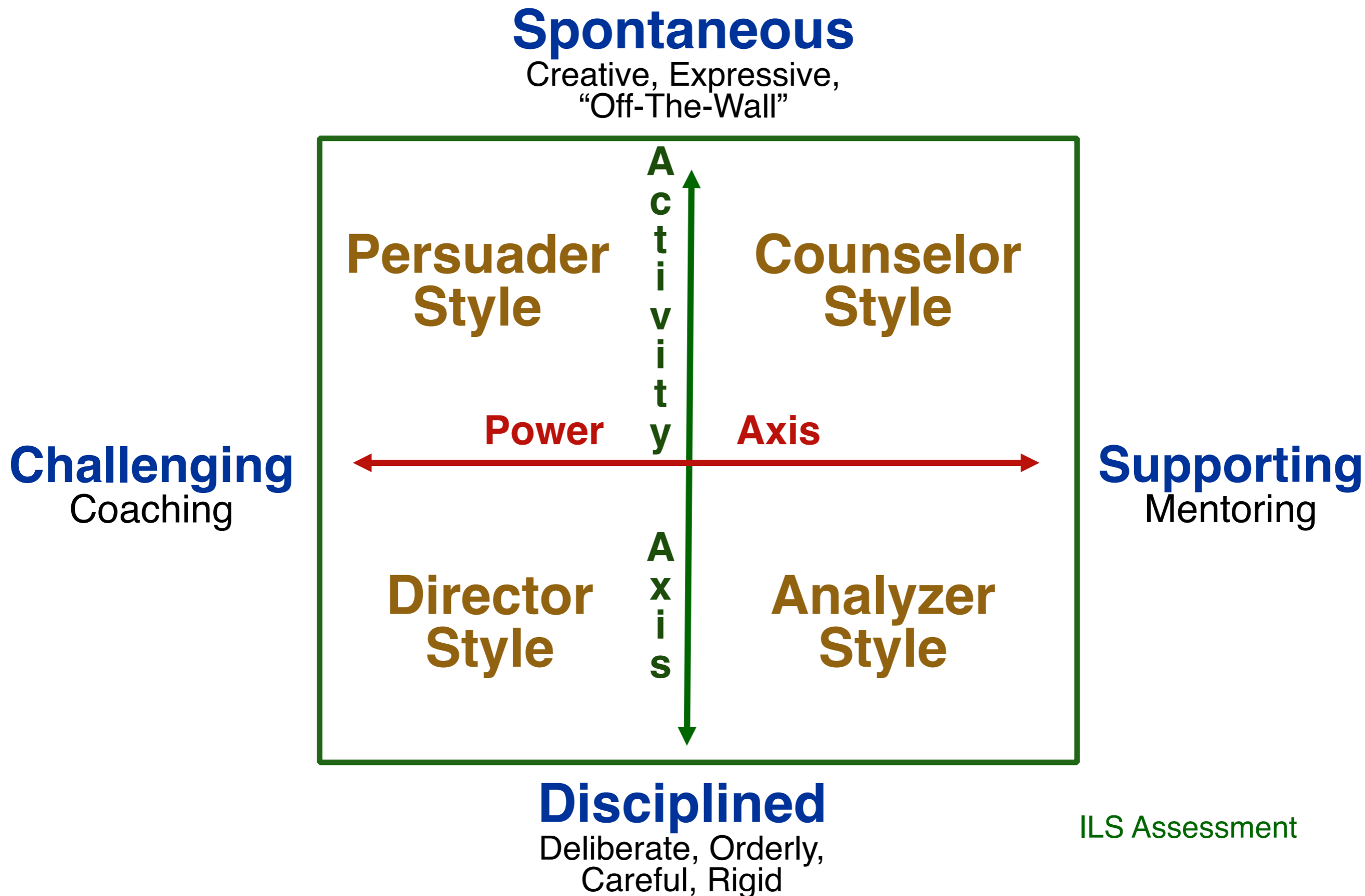
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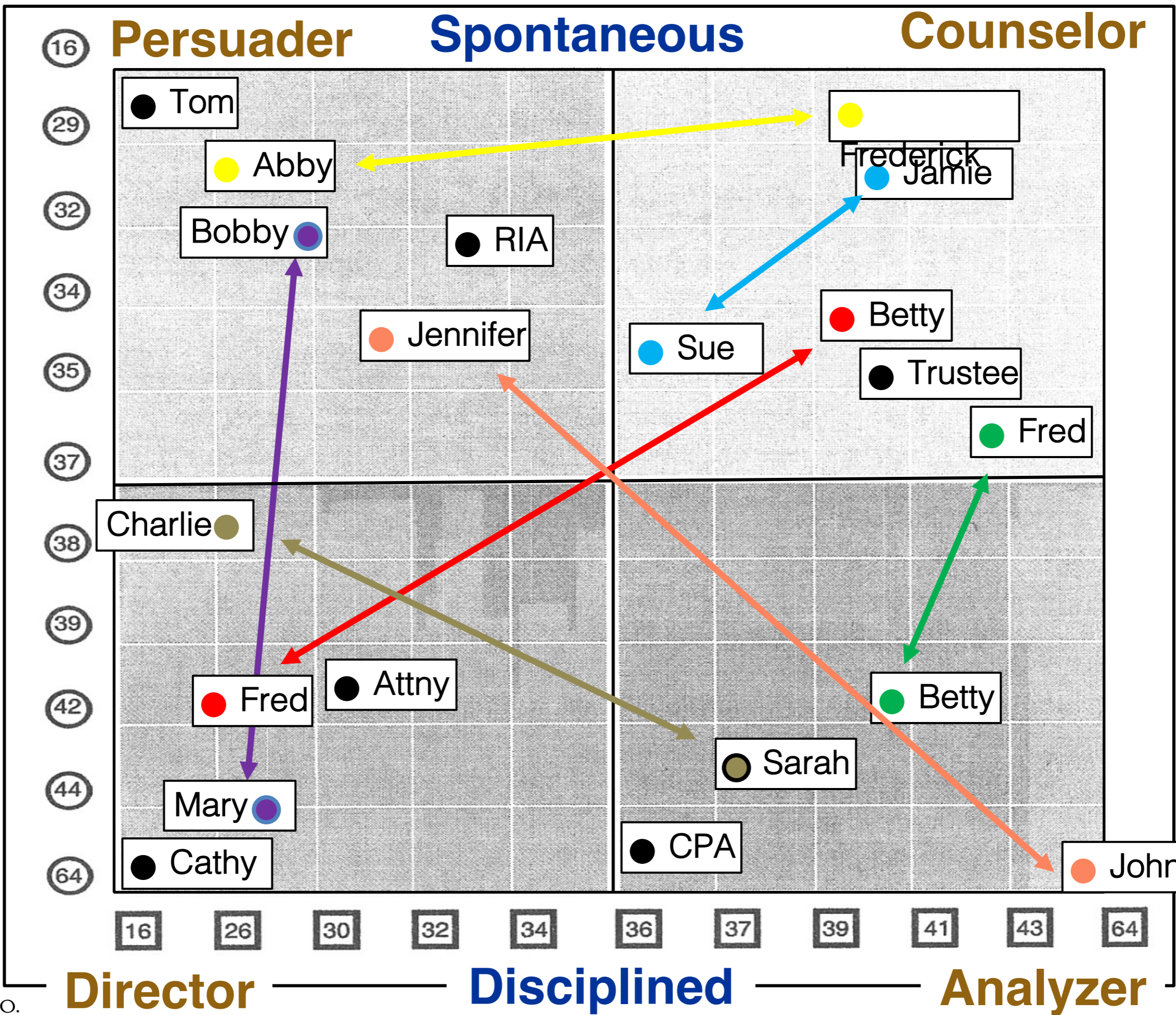
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# Family Communication Styles

“Can we talk?”



Challenging



Supporting

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# **Family Values, Vision, Mission, ...**

Getting to Interdependence - "LITTLE TRAIN?"

- 1) Values – Starting with words, leading to statements, stories and actions.**
- 2) Vision – What do you see your family looking like in 5, 10, 20 years? What is your role in that future vision?**
- 3) Mission Statement – We agree on this shared goal - We have a written strategy to get there. It includes Tactics, Timeframe, Details and Metrics.**

# Wealth in Families

## DEFINITION

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**1. Human Capital – Me**

**2. Intellectual & Family Capital – We**

**3. Social Capital – World**

**4. Financial Capital – Wealth Wisdom**

**James E. Hughes Jr.**

# Wealth in Families

## MISSION/VISION

---

**1. Human Capital – Love of Self**

**2. Intellectual & Family Capital – Love of Family**

**3. Social Capital – Love of Others**

**4. Spiritual Capital – Love of God**

**5. Financial Capital\* – Love of Creation**

\*The purpose of financial capital is to enhance human, intellectual, social, and spiritual capital.

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**4. Financial Capital\* – Love of Creation**

**Spiritual Capital – Love of God**

\*The purpose of financial capital is to enhance human, intellectual, and social, capital, all based on the family spiritual capital

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# Family Trust and Truth –

Getting to “Transparent Honest Communication”

**“We need to build a bridge of Grace and Trust with each other so we can drive the truck of Truth over it.”**

**Green Family Grandson-in-law**

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# Preserving Wealth in Families

## ACTIVITY AND COMMUNICATION

### “LITTLE TRAIN”

- A Vision - Horizontal vs. Vertical Structures.

**Rothschild vs. Vanderbilt – Family meetings?**

# Preserving Wealth in Families

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Rothschild vs. Vanderbilt – Family meetings?

- A Practice - Family Philanthropy. Low Consequence.

Philanthropy day? Aunt and Nephew story?

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- A Discipline - Family Governance. Higher Consequence.

Vacation Planning, Family Bank, Family Office?



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# The New York Times

## Sunday Business

SUNDAY, DECEMBER 9, 2007

SUNDAY MONEY

INVESTING

### Teaching Teamwork, But With Real Money

By GERALDINE FABRIKANT

**T**OM ROGERSON has seen his share of families bickering over money — often because they were utterly unprepared to handle it.

“The first time children make decisions together about significant wealth, it is usually sometime around settling the parents’ estate,” said Mr. Rogerson, the director of family wealth services at BNY Mellon Wealth Management. “That is a bad time for siblings to learn about making decisions as a group.”

Mr. Rogerson, 51, the father of two girls and two boys, has them off to an early start. Six years ago, when they ranged in age from 5 to 15, he and his wife decided to entrust them with \$5,000 each year. The children were to invest the money, which would be used for the family’s summer vacation. If the fund prospered, they might “go to Disney World,” he said. “If it stayed flat, we would go around the country and visit family members,” he added. “If the investment fell, there was always a camping trip.”

The family’s investing adventure has included camping trips as well as less spartan vacations — and it has given the children some basic education in finance and in teamwork, Mr. Rogerson said.

The point of the experience — learning to work together to make intelligent decisions about money — is an important one, and not just for wealthy families, several experts said.

Ted Beck, president of the National Endowment for Financial Education, for example, said he and his wife have had their children run several garage sales, mainly to teach them to work together in handling money. People with family businesses may want to have their children work in them part time to gain real-world experience. Merely talking about teamwork and money isn’t enough, Mr. Beck said. “Tying the educational moments to an actual event is when it really sinks in,” he said. “Otherwise, it is way too theoretical.”

It is important to explain how both



Tom and Cathy Rogerson and their children, clockwise, Peter, Billy, Sophie and Sarah. To impart lessons in managing money, the couple have given the children \$5,000 a year to invest collectively, to be used for the family vacation.

stocks and bonds work and to teach the art of working together in an emotionally laden family setting, several experts said. “We encourage financial literacy for youth to help lay a foundation for them to learn to manage money and ensure financial stability,” said Jeanette A. Tucker, professor of family economics at the Louisiana State University Agricultural Center. “The teamwork concept helps to strengthen strong families and prevents lots of hurt feelings.”

Such lessons are useful for a family regardless of its financial status, said Joline Godfrey, author of “Raising Financially Fit Kids.”

“It does not matter if the families are eking it out or if they are prosperous,” she said. “Any teaching that goes on for several years gives a clear message that it takes time to build a financial base.” She added: “It is also valuable to be explicit about your values. Otherwise, the kids will adopt the culture of their peers, and that is all about consumption.”

She described Mr. Rogerson’s approach as “a financial Outward Bound.” Faced with a challenge, she said, “they

have to try it” and will pick up valuable lessons along the way.

Mr. Rogerson turned his kids into investing guinea pigs in 2001 — a bad year for the domestic stock market, as it turned out. “The kids knew nothing,” he recalled. “They bought stocks like Apple and Hasbro and all these penny stocks at high-tech and toy companies. Their pile went down from \$5,000 to \$2,000.” That year, he said, “we went camping.”

During the second year, the children were so nervous about “putting Mom and Dad back in a tent again that they eventually put all the money in money market accounts,” he said. “They made \$50,” he added. “That year we drove down to Florida to visit family.”

“Since we were six people, we stayed at Holiday Inns along the way. We spent the money on motels, food and entertainment. My father lived in Daytona and my wife’s mother lives in Naples. Along the way, the kids made decisions about what kinds of restaurants we could go to.”

**B**Y the third year, the investing bug had bitten, and the children wondered, “How do we invest so

# “Family Education”

## Let Them Learn Together, Through Mistakes and Successes.

## (Adversity?)

Paul Stoltz

# Christmas Morning 2019



# Preserving Wealth in Families

## ACTIVITY AND COMMUNICATION

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- A Practice - Family Philanthropy. Low Consequence.

Philanthropy day? Aunt and Nephew story?

- A Discipline - Family Governance. Higher Consequence.

Vacation Planning, Family Bank, Family Office?

- A Legacy - Caring Motivational Structures vs. Care-taking

“Invest in you” vs. “Distribute to you”

“A Family & Entrepreneurial Mindset”

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# “Advancement”

## Family Advancement Sustainability Trust

How do you endow a Chair at your family table designed to Invest Into your family members rather than Distribute To your family members?

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# “Advancement”

## Family Advancement Sustainability Trust (FAST)

## “Endowing the Family Meeting Process.”

### FEATURE: THE MODERN PRACTICE

By **Marvin E. Blum, Gary V. Post and Thomas Rogerson**

## A FAST Solution to Legacy Planning

The “family advancement sustainability trust”

In their recent article entitled, “Innovate or Die,” Timothy J. Belber, Ian McDermott, and John A. Warnick assess the current estate-planning landscape and perceptively find the profession to be at a turning point.<sup>1</sup> While tactical, tax-driven planning (along with asset protection planning) was the driving force for estate planning throughout the 1980s, 1990s and early 2000s, the authors point out that there are forces at work disrupting the traditional paradigm of tax-centered estate planning. The passage of the American Taxpayer Relief Act of 2012 and its increased exemptions, higher income tax rates and portability may have triggered a renewed emphasis on technical estate-planning practices, but a number of societal changes are placing a new demand on estate planners. There’s a chasm developing between what constitutes a traditional estate plan and what clients need and expect. Belber, McDermott and Warnick make it clear that estate planners must address these new developments or run the risk of becoming obsolete.

For those seeking to stay ahead of the changing landscape, the first step is an understanding of the ways in which traditional estate planning falls short of meeting a client’s needs. The problem with traditional planning is that it’s far too narrow in its scope. Historically, an expertly crafted estate plan would transfer wealth from one generation to the next in a tax-efficient manner,

protecting the client’s assets and ensuring an effective system was in place to administer those assets for heirs. While this process remains the foundation of estate planning, it’s become only the first part of a two-part race. More and more, clients are beginning to understand that even the most well-crafted estate plan will be useless if it fails to address their qualitative goals and/or if their heirs are unprepared to receive the inheritance. The innovative, adaptive estate-planning attorney will break from the confines of the traditional model to include “expanded planning” as the second part of the estate-planning process.

### Two-Stage Process

**Stage 1:** This stage is twofold: (1) begin the process of teaching and enhancing family communication skills, and (2) work with family members and spouses at the first generation (G1) and second generation (G2) levels (and third generation (G3) if practical) to clarify and commit to family beliefs, shared values and goals. The ultimate objective of this first stage is to create a collective family mission statement outlining the family’s core values, beliefs and goals. This process can yield three useful results for moving to the next level of expanded planning.

1. Start the ongoing process of garnering participation and buy-in from G1, G2 and G3 (if practical), building cohesion and connection and giving the family members a cause behind which they can unite.
2. Identify relationship issues that can be addressed and resolved while the matriarch and patriarch are alive and participating. Relationship issues can spring from obvious situations such as a family business, a second marriage or access, use and management of a family ranch or vacation home. Further, the process

From left to right: **Marvin E. Blum** is the founder and **Gary V. Post** is a partner, both at The Blum Firm, P.C., in Fort Worth, Texas. **Thomas Rogerson** is a family wealth



strategist at Wilmington Trust in Wilmington, Del.

# **“Advancement”**

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**“Parents are more likely to endow a chair at a university to help educate strangers than to endow a chair at their family table to help educate the family.”**

**- Tom Rogerson**

# Thoughts on:

- **Why are business owners very likely to build culture and teamwork in their business but not in their home?**
- **Is the purpose of a family the same for every family? If not, how could it be different?**
- **What are the positives and negatives of focusing on the family before focusing on the money? How and when should a family focus on the money or business?**
- **What is holding you back from encouraging your clients to fund a trust to endow the family meeting process, i.e. a F.A.S.T.?**

#1 New York Times bestselling author  
of *The Road to Character*

# DAVID BROOKS

## THE SECOND MOUNTAIN

The Quest for a Moral Life

**“Hyper Individualism”**

**“Join a Community!”**

David Brooks



NEW YORK TIMES BESTSELLER

## The Price of Privilege

How Parental Pressure and Material  
Advantage Are Creating a Generation  
of Disconnected and Unhappy Kids

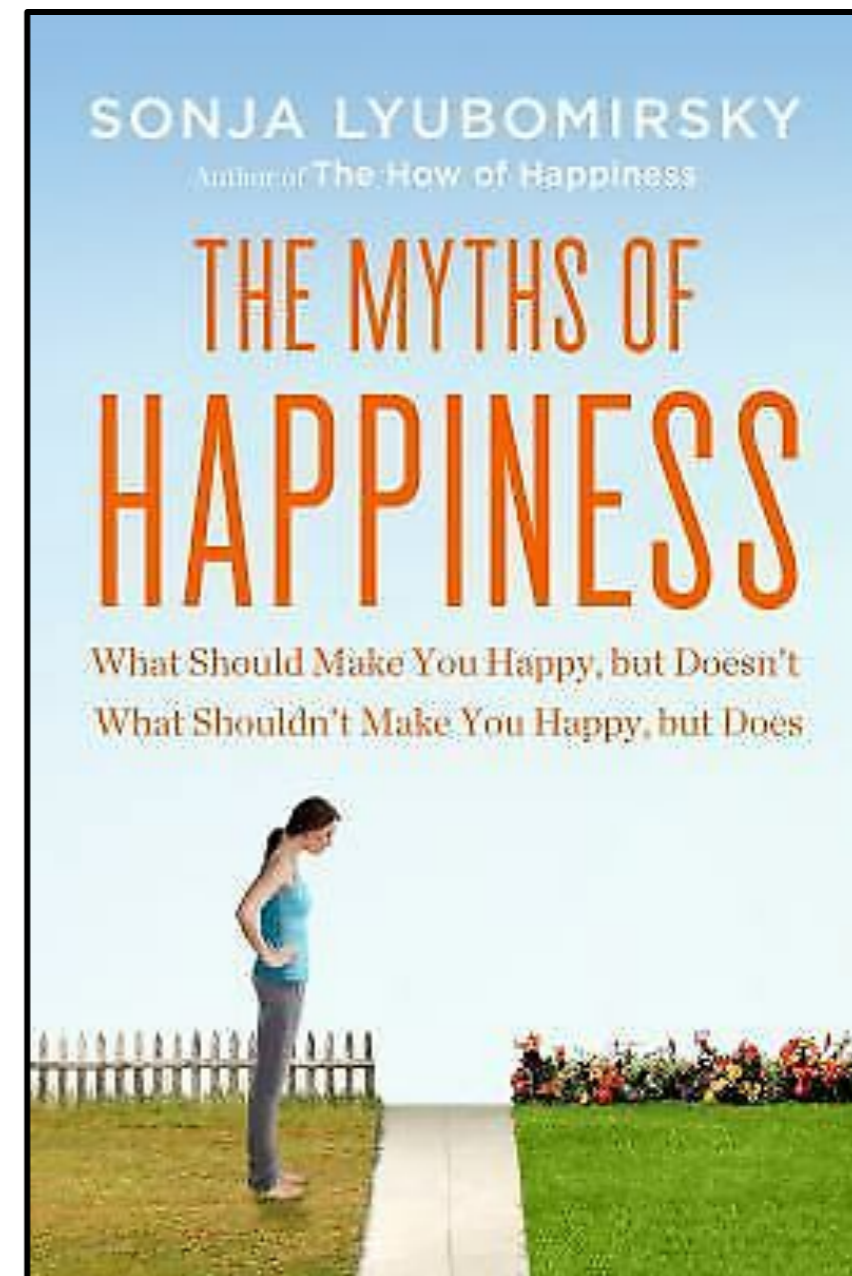
Madeline Levine, Ph.D.

“Seminal. . . All parents should consider this book a must-read, whether  
they’re having problems with their children or not.” —*Washington Post*

**“Disconnected,  
Pressured & Unhappy”**

**“Let them learn to Fail!”**

Madeline Levine, Ph.D.



SONJA LYUBOMIRSKY

Author of *The How of Happiness*

## THE MYTHS OF HAPPINESS

What Should Make You Happy, but Doesn't  
What Shouldn't Make You Happy, but Does

**“Hedonic Adaptation”**

**“Slow it down! Expose them to  
what Normal looks like”**

Sonja Lyubomirsky

# Takeaway thoughts and ideas:

- **“How do you start with your clients or family?”**
  - **Learn the language of Family Culture, Governance & Legacy**
  - **Read a book or two on this topic (see reference material, or call us).**
- **Line up a few questions to start the conversation with clients**
  - **“Could I see the agenda of your last Family Meeting?”**
  - **“What successful process of Conflict Practice and Management has your family chosen?”**
  - **“Could I see the Family Mission Statement that your family created?”**
  - **“Is one of your trusts designed to Invest Into your heirs rather than Distribute To your heirs?”**

# Next Steps

## Now What?

- ▶ Get started!
- ▶ Add a Family Governance process to your practice and your family.
- ▶ Hire an experienced Family Facilitator! (Or train one in your practice.)
- ▶ Schedule Family Meetings! (Motivate your clients to “DO IT!”)
- ▶ Set up a FAST to endow a family meeting process!
- ▶ **GenLeg can do all of this for you or with you! Call us.**
- ▶ **Get Started NOW!**

**“If you want to go fast, go alone.**

**If you want to go far, go together.”**

**- African Proverb**

# Key Conclusions – “Get Started!”

1. Most families fail at preserving wealth and family – 70% fail by end of the second generation, 90% after three generations.
2. The cause of this phenomenal wealth and family erosion isn't bad investment management or bad tax planning, Rather, it's the lack of trust and communication around group decision making.
3. Most modern estate planning does not address the critical issues of trust and communication inside the family. In fact, many traditional estate plans increase the likelihood of wealth and family erosion.
4. Family culture is hard to change, especially from the inside, but done right can help establish shared connection and identity while building resilience.
5. The key to changing the paradigm of “shirtsleeves to shirtsleeves in three generations” is Family Learning through Family Meetings. Family Education is: “Lifelong Learning Together!”
6. Families must Have Family Meetings, where they build trust, choose interdependence, and practice group decision making
7. Governance practices need to be clear, relevant, followed, and Endowed – Fund a F.A.S.T.
8. Shared experiences, activities and traditions create “belonging,” reinforce commitment, create resilience, and fortify relationships.
9. Hire Experienced Family Facilitators/Consultants to get the process started and keep it going – “The opposite of Control is Participation!”

# Peak Trust Company and GenLeg Co., Inc.



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**Q. & A.**



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