



# The Continuity Center for Wealth Integration

## Leverage Wealth for the Good of Your Family and Community

One of the greatest challenges for affluent families is integrating wealth productively into the fabric of their lives. Successful and mindful integration of wealth not only enhances your life but also protects lasting relationships and your ability to positively impact your family and your community.

## Embrace the Benefits and Challenges of Family Wealth

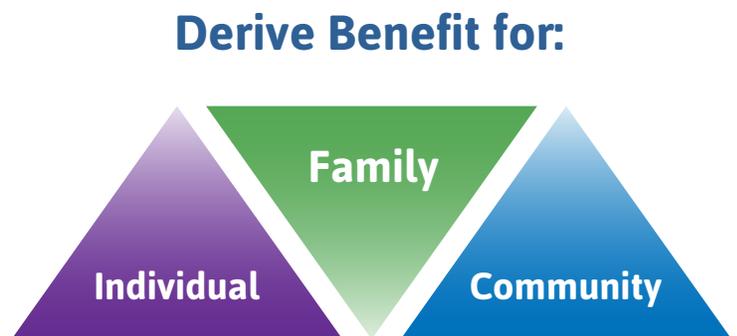
Many of us learned not to talk about money. We didn't worry about the impact wealth might have on our children and their ability to lead productive and satisfying lives.

In reality, integrating wealth into your family or preparing your rising generation to take responsibility for their wealth poses many challenges. With purposeful planning and discussion, you can avoid misalignment over wealth and can effectively enrich the lives of others through your wealth.

## Build Your Legacy

You have the power to change lives if you deploy your wealth in a productive way. That chance to leave your mark is one of the great opportunities and responsibilities that comes with wealth. It can feel like a burden to hold this responsibility, with "all eyes on you." It is also no secret that conflict—both internal and external—often accompanies privilege. Engaging in deliberate wealth integration planning helps you think long-term, defuse conflict and optimize your influence now and in the future.

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## Maintain Alignment With the Purpose and Values of Your Evolving Family

Continuity works with enterprising families to help them articulate a common purpose regarding wealth. Together, we clarify your wishes and a plan of action to use your wealth to enhance your lives and maximize your positive impact.

### Have you asked yourself any of these questions?

- What values and vision guide our family?
- How will we make decisions together?
- Are we aligned on appropriate uses of our resources?
- How will we manage wealth disparity in our extended family?
- Regarding children – how do we:
  - ✦ Talk with and educate them about wealth
  - ✦ Protect them from entitlement
  - ✦ Motivate them to achieve
- How do we envision our family legacy?
- Should we open or join a family office?

We develop customized solutions to your unique challenges regarding wealth integration. Potential topics may include:

- **Pre-nuptial agreements / Post-nuptial agreements**
  - ✦ Protecting other wealth-holders
  - ✦ Managing wealth disparity in a marriage
- **Trustees**
  - ✦ Establishing a human relationship, not just a legal relationship
- **Education of the rising generation**
  - ✦ Developing financial literacy
  - ✦ Understanding safety and security
  - ✦ Articulating and transmitting values
- **Philanthropy**
  - ✦ Understanding the challenges of shared philanthropy
  - ✦ Considering non-profit board participation
  - ✦ Enhancing professional opportunity
- **Family councils / constitution**
  - ✦ Establishing values
  - ✦ Nurturing stewardship
  - ✦ Articulating purpose

We do not offer asset management services, sell insurance, work as estate planners, or provide investment advice.

We help you and your family gain clarity about the responsibilities of having wealth and develop clear implementation plans to help you derive benefit from wealth.

## About Continuity Family Business Consulting

Founded in 2003, Continuity Family Business Consulting focuses exclusively on working with family businesses, family offices, and families of wealth. We work with all stakeholders to ensure long-term economic success while building family strength and cohesiveness.

Our exceptional team of consultants and trainers have advanced training in business and family systems, and they are thought leaders in conflict management when continuing relationships matter.

Contact Sally Paquet ([SPaquet@ContinuityFBC.com](mailto:SPaquet@ContinuityFBC.com)) to learn more about how we can help you achieve your goals and maximize your positive impact.