

Desired Outcomes of The Heritage Process™

Alignment Conversation:

- Identify and prioritize your desired outcomes.
- Identify your current situation and gaps.
- Quantify the value to you of achieving those outcomes.
- Prioritize next steps identified to achieve your desired outcomes.
- Determine whether working together will help you achieve those outcomes.

Family Alignment Day Program (or similar event).

Individually and together your family will determine:

- The important/essential purposes of your family.
- The value of keeping your family together.
- Your individual communication styles, and how to communicate more effectively with each other and together as a family.
- The family's common values.
- The value of keeping your financial wealth in the family for generations.
- Next steps to help your family thrive.

Guided Discovery and Heritage Statement:

- The Guided Discover interviews will help you:
 - Identify and articulate your story, life lessons, values, standards and principles.
 - Clarify the positive turning points and influencers in your life.
 - Articulate your vision for your family's future.
- **Your Heritage Statement will:**
 - Document the insights from your Guided Discovery in a meaningful, inspiring and compelling document for the benefit of you and future generations.

Collaborative Teams:

- Identify, engage and coordinate the team(s) of professionals required to help you achieve your desired outcomes.

Initial Heritage Day:

- Celebrate the family's heritage.
- Share the Heritage Statement.
- Enhance communication, trust, and team building in the family.
- Continue the process of developing and transferring leadership and responsibility to the next generation(s).

Ongoing Heritage Days:

Regular (typically annual) Ongoing Heritage Days are the key element for successful multigenerational families. This is how and when the family develops and passes the culture of communication, trust and mentoring around its common vision that is vital to maintain a successful multi-generational family. Themes for these gatherings may include:

- Creating your family's Purpose Statement.
- Creating and implement Family Governance.
- Developing the rising generations through mentoring and "pre-inheritance" experiences.
- Developing and implementing the "business of being a family" (not the family business).

