



THE BENEFITS OF HERITAGE DESIGN FOR FAMILIES¹

We know that 70% of inheritors will squander their inheritance. Are you confident that your children and grandchildren are prepared for the inheritance they will receive?

Heritage Design services can give you that confidence.

1. By themselves, traditional financial and estate planning fails to keep families and their financial wealth together. The inheritors will squander the wealth and the families will disintegrate 70% of the time. And, 90% of the time the family wealth will be squandered and family unity destroyed by the end of the 3rd generation.
2. The 10% of families who are successful at sustaining their family wealth and unity across three generations or more share several common traits, including creating and maintaining common vision and a culture of communication, trust, and mentoring from one generation to the next.
3. Creating and maintain common vision and a culture of communication, trust, and mentoring from one generation to the next requires ongoing, intentional and purposeful family meetings and training. It does not happen with one or even a series of events. We refer to these family meetings as Ongoing Heritage Days.
4. The process of creating and maintaining common vision and a culture of communication, trust, and mentoring from one generation to the next often begins with a Family Alignment Day™.
5. Heritage Design Professionals™ are uniquely trained to help you and your family create and maintain common vision and a culture of communication, trust, and mentoring from one generation to the next.

¹ Please contact us or visit our website for supporting documentation.