

## Family Legacy Retreat

The Family Legacy Retreat is a three to four-day facilitated workshop designed specifically for:

- Affluent families that desire to improve their family money dynamics by learning how to communicate about money in a more effective and healthy way.
- Family business owners who want to support family members who work in the business to reach their full potential.
- Philanthropic families with foundations seeking greater impact in both how they give, as well as how their engagement with the foundation augments their individual and family lives.
- Families with an elder family leader that aspires to strategically and effectively pass the reigns to the next generation with ease, grace, and confidence.
- Family members who have a foundation and lack direction and purpose, and who want to be more competent and fulfilled in their respective roles.
- Families contending with inheritance and Trusts issues where the beneficiaries require additional skills and coaching to help them competently and confidently navigate their financial decisions and wealth, both individually and collectively.

The Family Legacy Retreat provides a safe environment for families to learn to work together while honoring the legacy of the past and empowering future generations. Through a step-by-step process, participants will learn to break free of self-limiting personal and familial money patterns and begin to experience greater ease and less conflict around money. In addition, participants will learn to navigate their internal and familial money dynamics from a place of self-awareness, trust, and accountability. This retreat provides families with the skills they need to become more fully aligned and empowered to create a legacy of love and trust.

### PARTICIPANT OUTCOMES:

1. Share and discover family members' hopes and dreams while co-creating a vision for the future that is fully aligned.
2. Practice new, healthy communication techniques with one another.
3. Explore individual and family money patterns and money beliefs and how they dramatically impact their communications and decision-making.
4. Discover new ways to work together as a family to support the highest good of both individual and family needs, desires and shared endeavors.
5. Move beyond blocks and obstacles that may limit or sabotage the personal or financial potential of individuals within the family, or the family itself.
6. Develop greater understanding, compassion, and connection.