

THE CENTRAL ROLE OF FAMILY LEGACY AND FAMILY GOVERNANCE IN TODAY'S ESTATE PLANNING



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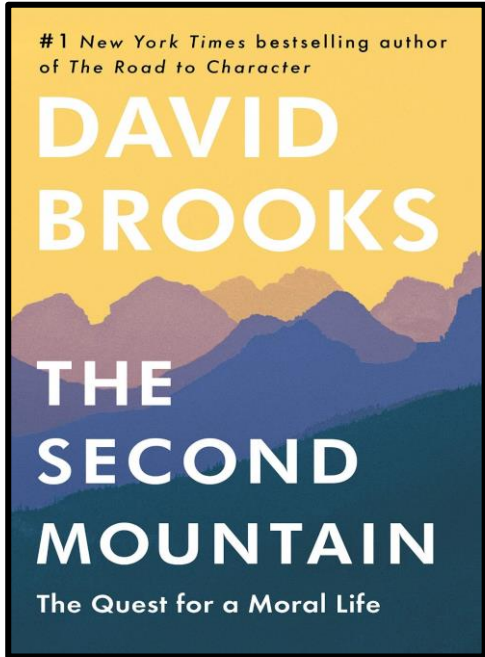
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“A cord of three strands is not easily broken.”

**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!”**

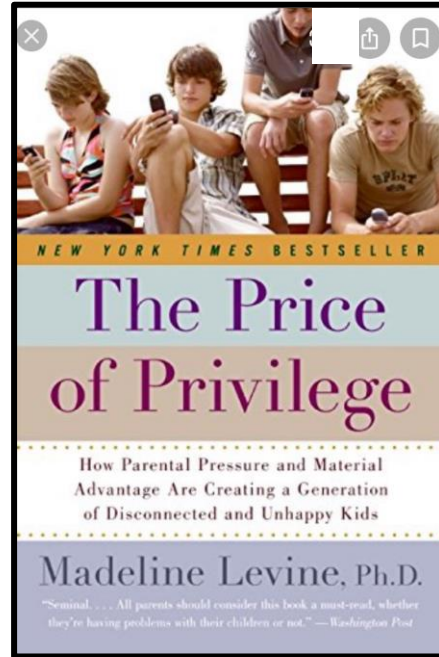
Book List



“Hyper Individualism”

“Join a Community!”

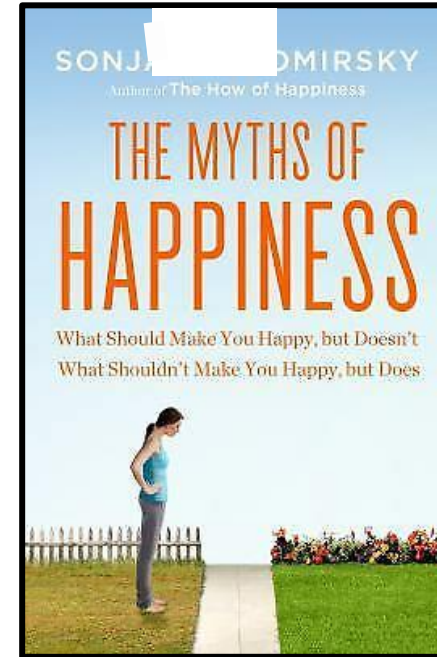
David Brooks



“Disconnected,
Pressured & Unhappy”

“Let them learn to Fail!”

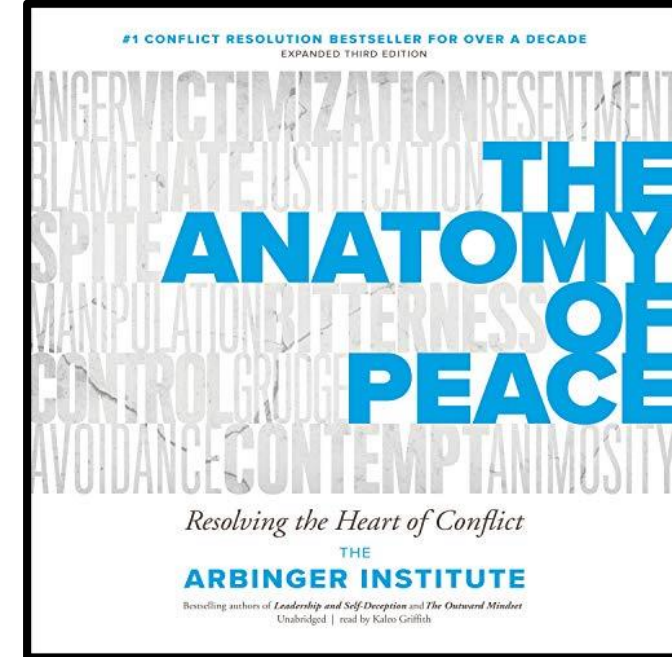
Madeline Levine, Ph.D.



“Hedonic Adaptation”

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

Sonja Lyubomirsky



“A Heart at War”

““The Four Boxes that we put ourselves in.”

Arbinger Institute

For Help With Younger Children

- *Raising Financially Fit Kids* – Joline Godfrey
- *Cleaning House: A Mom's 12-Month Experiment to Rid Her Home of Youth Entitlement* - Kay Wills Wyma
- DoughMain.com - Ken Damato & Ned Hentz
- *The Financially Intelligent Parent* – Gallo & Gallo
- *The Blessing of a Skinned Knee* by Wendy Mogel
- *The Opposite of Spoiled* by Ron Lieber

Building Awareness of Wealth Issues for Teenagers and Older

- *Kids, Wealth, And Consequences - Morris & Pearl*
- *The Myths of Happiness – Sonja Lyubomirsky (“Hedonic Adaptation”)*
- *The Ultimate Gift – Jim Stovall*
- *The Born Rich Video – Jamie Johnson*
- *Outliers and The Tipping Point – Malcolm Gladwell (“Values vs. Experiences”)*
- *David & Goliath – (“Wealth & happiness”) (“Dyslexia & agreeableness) Parts 1 & 2*
- *Children of Paradise – Lee Hausner*
- *The Five Dysfunctions of a Team – Patrick Lencioni (“Unfiltered Communication”)*
- *What Matters - Cam Thornton & Rod Zeeb*
- *Family Wars – Gordon & Nicholson – etc.*
- *The Price of Privilege by Madeline Levine*
- *The Myth of Laziness by Mel Levine M.D.*
- *A Whole New Mind by Daniel Pink*
- *Failure to Launch by Mark McConville, Ph.D.*
- *The Born Rich Video by Jamie Johnson (HBO)*
- *The Pecking Order by Dalton Conley (poorly written but interesting data)*

Tools and Books to help with Family Communication and Trust

Stratton Consulting Group ILS Test – Call us for this. We have specific experience at applying this tool to families.

Understanding Other People – Beverly Flaxington

Strengths Finder 2.0 – Tom Rath

Food For Talk – Great Family Conversation Cards

DISC Personality Test, Kolbe Test, or Enneagram

Financial DNA – Hugh Massie

Magnificent Mind at Any Age – Daniel Amen M.D.

Triggers by Marshall Goldsmith and Mark Reiter

The Road Back To You by Ian Morgan Cron and Suzanne Stabile

Big Talk - Great Family Conversation Cards – www.makebigtalk.com

The Stories We Tell Ourselves by Scott Gornito

Radical Candor by Kim Scott

Deconstructing Conflict by Doug Baumoel and Blair Trippe

How To Win Friends and Influence People by Dale Carnegie

Management “Working together” books that relate to Family as well

Outliers, The Tipping Point (“Values vs. Experiences”), David & Goliath (“Wealth & happiness” “Dyslexia & agreeableness - Parts 1 & 2 of this book) - All by Malcolm Gladwell

The Five Dysfunctions of a Team and The Advantage – Both by Patrick Lencioni

“The Anatomy of Peace” – Arbinger Institute

Tools and Books to help with Family Values

- **Working With The Ones You Love – Dennis Jaffe - Changeworks Values Edge Kit**
[www.djaffe@saybrook.edu](mailto:djaffe@saybrook.edu)
- **The Adversity Advantage – Paul Stoltz**
- **21/64 “Values Cards” – www.2164.net**
- **Ethical Wills – Susan Turnbull – www.youethicalwill.com**
- **The Ten Lenses – Mark A. Williams**
- **Beyond Success – Randall J. Ottinger**
- **Individual and Family Mission/Vision Statements? Call us for this.**
- **Halftime – Bob Buford Family**
- **The Happiness Advantage by Shawn Achor**
- **What Happy People Know by Dan Baker**
- **Family Entrepreneurship Program: Call us at GenLeg Co. for details (617) 688-2029**
Parent & Child Experience -“Do to Learn!” - Rather than - “Learn to Do!”
- **Teambuilding Experiences: Outward Bound – www.outwardbound.org**
Geocaching, or Build a Boat, Escape Room, or ...?

Books and Tools to help with Family Philanthropy

- *Main Street Legacy: Adventures in Philanthropy* 407-593-2386
- *The Philanthropic Initiative* (tpi.org)
- *Wealth in Families* – Charlie Collier
- *Philanthropy, Heirs and Values* – Williams/Pressier
- *Preparing Heirs* – Williams/Pressier
- *Can't Take It With You* – Lewis Cullman
- *Micro Finance* – kiva.org?, etc.
- *Giving it all Away* by David Green and Bill High
- *The Moment of Lift* by Melinda Gates
- *Mission Drift* by Peter Greer and Chris Horst
- *Wealth in Families* by Charlie Collier
- *Habitat For Humanity - DO it as a Family!*
- *New Process of Family Giving vs. Individual Giving or Giving to “Past Pets”*
Call us at GenLeg Co. for details (617) 688-2029
- *Give \$mart* - Thomas Tierney & Joel Fleishman
- *Leap of Reason* - Mario Morino
- *New Process of Family Giving vs. Giving to “Past Pets”*
- *Social Venture Partners?*

Planning & Investing Resources, along with Geopolitical Risks

Planning -

- **Entrusted** by Andrew Howell and David York
- **Winners Take All** by Anand Giridharadas (To give you a glimpse at the perspective of those that want to take wealth from you)

Investment Management – Wall Street’s Product approach vs a Fiduciary approach.

- **Inside Job** (Movie about the problems with Wall Street’s approach and conflicts of interest)
- **Financial DNA** by Hugh Massie
- **Why I Left Goldman Sachs** by Greg Smith
- **Capitalism Without Capital** by Jonathan Haskel and Stian Westlake
- **The Experience Economy** by Joseph Pine and James Gilmore

Geopolitics (and the affect it can have on Family Legacy}

- **The Fourth Turning** by William Strauss and Neil Howe
- **The Storm Before the Calm** and **The Next 100 Years** – Both by George Friedman
- **The Accidental Superpower** and **The Absent Superpower** – Both by Peter Zeihan

Books to help with Family Legacy Vision

- **Family Wealth: Keeping It in the Family – Jay Hughes**
- **Strangers in Paradise – Jim Grubman**
- **Building a Hundred Year Family Enterprise – Dennis Jaffe**
- **Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times**
- Mark Daniell and Sarah Hamilton
- **Family Business and Positive Psychology – Scott E. Friedman**
- **For Love & Money – John Ambrecht, Howard Berens, Richard Goldwater, & Tom Gorman**
- **Beyond Success – Randall Ottinger**
- **Empowered Wealth – Brower/Thurber**
- **Family Mission Statement and/or Family Constitution – Not for everyone but Imperative for some? Call us at GenLeg Co. for details (617) 688-2029**

Family Stories of Wealth and Loss

- Mellon: An American Life by David Cannadine
- Beer Money by Francis Stroh
- Dethroning the King by Julia Macintosh
- The King of California by Mark Arax and Rick Wartzman
- Barons of the Sea by Steven Ujifusa
- Titan by Ron Chernow (about Rockefeller)
- The First Tycoon by Mark Deakins (about Vanderbilt)
- Andrew Carnegie by David Nasaw
- Becoming Steve Jobs by Brent Schlender and Rick Tetzeli
- The Big House by Colt George Howe
- The Big Rich by Bryan Burrough

For Families in Business

- **Preserving the Legacy of a Family-Owned Business by Bachmeyer & Snyder**
- **Perpetuating the Family Business by John L. Ward**
- **Generation To Generation by John Davis, Gersick, McCollom, & Landsberg**
- **Working With the Ones You Love by Dennis Jaffe**
- **Teaching Entrepreneurship by Neck, Green and Brush**
- **The ONE Thing by Keller & Papasan (A business book but the lessons can be applied to the family)**
- **Family Entrepreneurship Program: Call us at GenLeg Co. for details (617) 688-2029**
- **Parent & Child Experience -“Do to Learn!” - Rather than - “Learn to Do!”**

Other Family Wealth and Family Legacy Books

- **CEO Dad by Tom Stern (Good Humor)**
- **Navigating the Dark Side of Wealth by Thayer Willis**
- **The Golden Ghetto by Jessie O’Neill**
- **Money Harmony by Olivia Mellan**
- **Loonshots by Safi Bahcall**
- **White Picket Fences by Amy Julia Becker**