



*At Cresset, we help clients focus on the entire picture. Our team of experts work together to help clients protect their most valuable assets, their families.*

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**CRESSET'S CREATIVE AND PERSONALIZED APPROACH TO GOVERNANCE AND EDUCATION SUPPORTS FAMILIES BY:**

- Creating meaningful communication and experiences within families
- Encouraging independence, while fostering shared decision making and interdependence
- Preparing, empowering and engaging the next generation of leaders and owners
- Helping individual family members identify passions and opportunities and make their desired impact
- Easing uncertainty and anxiety around wealth

**LIVES ARE BUSY AND SITUATIONS ARE UNIQUE. WE DELIVER CONTENT IN A VARIETY OF WAYS TO MEET PERSONAL NEEDS:**

- Family meetings and retreats
- Small groups
- One-on-one
- Webinars and virtual meetings
- Guided and self-paced
- Multi-client or camps
- Couples
- Mother & daughter / father & son

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## COMMUNICATION, FAMILY CULTURE, MONEY AND RELATIONSHIPS

- Shared family values
- Family history and stories of successes and challenges
- Authenticity vs. self-protection
- Trust and inclusion
- Respect and empathy between generations
- Fair vs. equal and saying “no”
- Navigating financial inequality in relationships

## GOVERNANCE AND SHARED DECISION MAKING

- Family meeting facilitation
- Governance
- Determining what decisions are shared and how they will be made
- Succession and wealth transfer
- Family councils and constitutions
- Family employment policy
- Conflict resolution tools

## PHILANTHROPY, LEGACY AND IMPACT

- Connecting personal values with causes
- Due diligence and impact assessments
- Impact investing and QOZ
- Family foundations and donor-advised funds
- Giving circles, service learning, and peer-to-peer education travel

## ENTREPRENEURSHIP, LEADERSHIP AND PERSONAL DEVELOPMENT

- Self-awareness, personal mission and defining success
- Business fundamentals
- Business creation and intrapreneurship
- Business funding options
- Projections and financial models
- Identifying and developing leadership traits
- Career exploration
- Networking and social media
- Negotiations and presentation skills
- Peer networks
- Identifying opportunities

## FINANCIAL LITERACY AND RISK MANAGEMENT

- Saving, banking, credit, and debt
- Budgets and cash flow management
- The stock market and alternative investments
- Understanding financial statements
- Prenups and cohabitation agreements
- Taxes
- Trusts and navigating trustee and beneficiary relationships
- Intention values-based estate planning
- Financial role modeling and teachable moments