

Create the Legacy You Want to See Flourish

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Hope Is Not a Strategy.

Impactful legacies aren't accidental—they're built with vision, intention, and purpose. Too often, wealth is passed on without wisdom, values go unspoken, and dreams stay undefined. Without a plan, families risk division and lost potential.

A Guided Journey for Generational Impact.

The Family Legacy Planning program is designed to help your family turn hope into action. Through two distinct, interconnected phases, we guide your family through a legacy-defining process and then help you bring it to life.



Phase 1: NorthStar

Identifying Your Family's True North

We help the first generation define your family's core identity—its unchanging purpose, values, and vision including:

- Family Identity – Who you are and what you stand for
- Family Values – What matters most
- Family Purpose – How you envision your future
- Family NorthStar – Unifying presentation reflecting your *Why*



Phase 2: Navigation

Bringing Your Legacy Vision to Life

Through hands-on coaching and immersive activities, we help you build a vibrant, living legacy that empowers your family by:

- Creating a Family Mission Statement to put purpose into action
- Strengthening communication and unity across generations
- Facilitating values-based experiences to build purpose-driven generosity
- Preparing rising generations to lead your legacy with clarity and heart

Beyond Estate Planning.

This is the why behind your wealth—the heartbeat of your legacy. It empowers future generations to lead with clarity, unity, and purpose. More than legal or financial, it's personal, powerful, and lasting. **It's a living legacy!**

What are you doing today for your family's tomorrow?

Let's define your True North, chart your course, and create a living legacy that lasts. Let's Talk.



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