

Formation

You care about all the important artifacts and processes, but it's mostly adhoc and reactionary.

Traits

- Mission & Purpose
- Setup & Operations
- Asset Management
- Financial Admin
- Manager Selection
- Investment Policy Statement
- Spending Policy Statement
- Wealth/Trust Advisory



I. Scattered



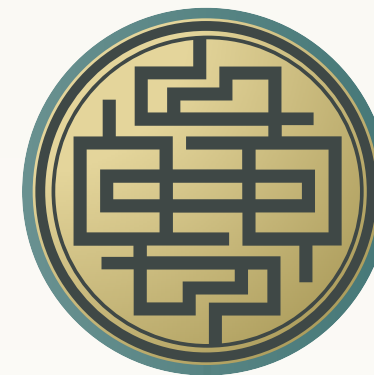
II. Theatre



III. Emergent



IV. Empowered



V. Matured



VI. Articulated

Governance

Evolving beyond “grab bag” mode, and becoming much more purposeful in your decision making.

Traits

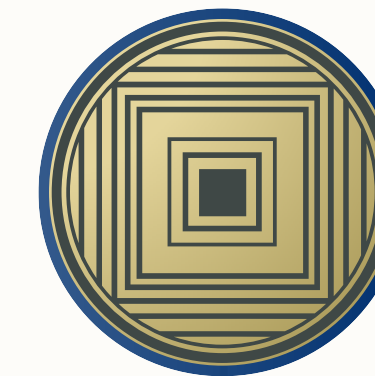
- Articulated Strategy
- Cash Forecasting
- Opening Up Conversations
- NextGen Strategy
- Philanthropy Baseline
- Start/Stop/Keep
- Comms Framework
- Internalizing Talent

Legacy

Creating a dynastic and enlightened family.

Traits

- Family Dynamics
- Core Values
- Legacy
- Dispute Resolution
- Impact/Philanthropy
- Investing Framework
- Family Meetings
- Family Charter



VII. Enlightened



VIII. Mastery



IX. Dynastic