

GROUP DYNAMICS	PERSONAL DEVELOPMENT
Family Learning Culture	Personal Growth and Mentoring
<ul style="list-style-type: none"> • Securing Buy-In for Family Learning • Generational Learning Preferences • Design Thinking – Applications for Learning • Cultivating Learning Leaders in Every Generation • Fostering a Learning Culture in the Family and the Family Office • Defining Family Learning Success - Outcomes and Metrics • Design Thinking – Applications for Family Learning • Learning Strategies for Every Life Stage • Learning Styles – How to Engage All Learners in a Meaningful Way • Roles and Responsibilities of the Chief Learning Officer • Developing a Family Learning Curriculum 	<ul style="list-style-type: none"> • Case Study: The Family Office Internship • Case Study: Engaging the Rising Gen in a Day of Caring • Introducing Young Adults to the Family Enterprise • Is It Time for a Coach? Coaching as a Component of Your Learning and Development Plan • Mentoring 101: The Role of Elders in Family Learning • Reverse Mentoring: Learning from the Rising Gen • Leadership Agility: A Framework for Vertical Leadership Development • Leadership Development: Strategies for Preparing the Rising Gen • Encouraging Entrepreneurship in the Rising Gen • Entrepreneurship: Ten Principles for Helping the Rising Generation Rise • Book Discussion: Raising an Entrepreneur
Ownership and Governance	Family Communication
<ul style="list-style-type: none"> • Creating a Self-paced Curriculum to Prepare the Next Gen for Participation in Family Governance • 10 Things Every New Board Member Needs to Know • What Kind of Owner are You? Active vs. Passive Ownership • Junior Boards and Committees: Tips and Lessons Learned • How Do You Define "Family"? • Everything You Ever Wanted to Know about Pre-Nups • Building Healthy Trustee/Beneficiary Relationships • Collaborative Decision-making: Tips for Working with Siblings and Cousins 	<ul style="list-style-type: none"> • Case Study: Fostering Community with a Family Website • Building Trust and Resolving Conflicts: Strategies for Fostering Healthy Relationships • Fostering Effective Trustee/Beneficiary Communication • The Art and Science of Listening • How to Write a Family Newsletter that Everyone Will Want to Read • Using Assessments to Improve Communication • The Elephant in the Room: Strategies for Navigating Difficult Conversations
Successful Family Meetings	Financial Building Blocks
<ul style="list-style-type: none"> • Meeting Evaluations and Family Surveys • Skype, Zoom and Other Strategies for Distance Learning • Family Meeting Success: Fostering Connection, Learning and Legacy • History Mapping: Documenting Your Legacy • Fun at the Family Meeting - Creative Ideas and Activities • Rules of Engagement: Developing Meeting Ground Rules • Where Are We Going Together? Vision, Mission & Values • Leadership Development & Team Building Tips • Traditions, Rites of Passage and Sharing Stories • Everything You Ever Wanted to Know about Pre-Nups • Book Discussion: How to Make Your Family Business Last 	<ul style="list-style-type: none"> • Financial Building Blocks - A Customized Financial Knowledge Platform for Family Education • Money and Relationships: Preparing Young Adults • The Family Balance Sheet: Quantifying a Family's Qualitative Capitals • When and How to Tell the Kids About the Wealth - Strategies for Parents • Entitlement Avoidance: Strategies for Parents • Philanthropy as a Training Ground for Future Leaders • Building Family Unity through Philanthro-Travel • Book Discussion: Raising Financially Fit Kids • Book Discussion: The Cycle of the Gift: Family Wealth and Wisdom