

## Taking Care of Wealth



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The often ignored reality in the family wealth transfer world is that the overwhelming majority of estates fail to transfer successfully to the next generation of families, no matter how much advance estate planning they have done.

- 70% of estate transfers fail. The heirs either spend down all the inherited wealth or they fight with each other and destroy the family harmony.
- The causes have nothing to do with estate planning or tax mistakes. A full 60% of the estates failed because of a lack of communication and trust within the family. Another 25% failed because the heirs had not been properly prepared for the roles and responsibilities they would assume after the parents died. And 10% failed because they didn't have an agreed-upon family mission for the wealth.
- Families that 'get along fine' while the parents are alive frequently come apart at the seams after they are gone. Disagreements, old grudges from childhood, inexperience and lack of preparation are the root causes.
- If you want your family to succeed after you are gone, they need opportunities to work together, talk to each other honestly and respectfully, and develop mutual trust in each other. They also need opportunities to experience challenges that are similar to those they will be expected to fulfill successfully after you are gone. They need mentors and guides to help them gain these crucial skills.
- Nobody would consider fielding an untrained and unprepared football team and expect to win the Super Bowl. How can we possibly expect untrained and unprepared heirs to succeed with a large inheritance?

If you aren't concerned about your own family's estate transfer, you should be. We have a process that creates unbelievable outcomes around the combination of wealth and family. Ask us and we will show you how to start the process to successfully continue your family legacy.



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