

# Peak Trust's Family Legacy Planning Program

We help families pick the next generation of leaders and prepare them, over time, to understand the values and goals of the current family leaders. Our goal is to help families prepare and transition successfully for future generations.

## **OUR PROCESS:**

### ***Preparation & Discovery:***

- Preparation Call & Survey
- Goal Setting & Ground Rules
- Mapping Family & Personalities
- Individual Interviews: discover each member's life plan and intentions

### ***Purpose & Values:***

- Defining Purpose: What is the shared Family Dream?
- Family values and causes
- What factors matter when deciding who will handle family businesses, investments, succession
- Write family mission statement & constitution
- Develop more formal governance structures and use other instruments to capture the ideas and decisions that emerged during the planning phase.

### ***Conflict Resolution:***

- Analysis and resolution of family problems which are the result of disagreements about the management of family wealth, transmission of wealth to the next generation, and/or business succession.
- Understand the impact of emotional and family factors that are in the way of finding a common ground. Address difficult topics, challenge perspectives, and question long standing family "truths" that aren't relevant or useful any more.

***"Throughout the process, I came to know myself better, became close to my beloved Katy and closer to the entire Rhodes family. I left with a sense of belonging, direction and purpose. I was propelled forward, inspired and convicted in areas of life where I was directionless before."***

*- Garrett Burleson*

### ***Tangible Takeaways***

- Family mission statement
- Family Constitution
- Video interviews/Story Capture
- Family Narrative/History
- Family Tree
- Checklist of distribution scenarios and their decisions on each – and why
- Letter of intent from the Legacy Leader, video of intent to help trust administrators

**“ I am so grateful for Matt and Peak Trust for offering Family Legacy Planning. What seemed to be a good program to better understand our family dynamics, turned out to be an opportunity to develop deeper relationships with my grown children and their spouses.**

**Life isn't always easy and we have been through some rough challenges since going through the program. Many time we have drawn on the knowledge we gained about each other during the Family Legacy Planning process and have been about to stay close despite the harsh circumstances.**

**In fact, not a day goes by, that I don't think about what we learned and apply it to my family. I can't imagine where we would be today without Matt and the preparation Peak Trust provided through the Family Legacy Planning Program. ”**

