LIVE, ONLINE PROGRAM

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Compounding Your Family's Wealth:

Building a Multigenerational, Family Enterprise Wealth Portfolio

November 10-12, 2021
Daily 9:00 AM – 12:30 PM Eastern

A 3-day, Interactive Program to reimagine your family's strategy for growing multigenerational wealth in the new economy.

FAMILIES NEED A WEALTH DEVELOPMENT STRATEGY

In today's turbulent environment, a comprehensive strategy to grow your family's wealth is essential.

Deliberate planning to grow a family's multigenerational; wealth, together with anticipating the impact of today's turbulent environment, is critical for advancing a family enterprise to its next growth stage.

Importantly, a comprehensive wealth development strategy must recognize that financial asset accumulation is but one consideration in building multigenerational wealth and success. There are several ingredients needed to build value for across generations—many of which are easily overlooked but will be explored in this program.

In this program, you will learn the ingredients to build long-term value as a family and the tools to construct a strategy for your family's multigenerational wealth creation and growth.

PROGRAM TAKEAWAYS

In this program, you will:

- Gain insights, knowledge, and tools to strategically design and lead your family's wealth development strategy for the new economy
- Understand the characteristics of today's turbulent era of that call for a new approach to wealth strategy
- Learn the ingredients for a family to build long-term value
- Learn the art of creating a multigenerational wealth strategy – a structured, deliberate process that takes into account the vision and goals of the family owners, today's turbulent environment, and the changing needs of the family enterprise
- Learn the strategies for making thoughtful, calculated bets on assets and activities that will power your family enterprise into the future
- Learn how to integrate and coordinate across your entire portfolio of companies, investments, assets, and activities
- Discover the financial policies, oversight, and governance needed for an enduring family enterprise wealth portfolio
- Identify the leadership and talent needed to create and execute your wealth strategy

FACULTY

Professor John A. Davis

Dr. Pascale Michaud

François de Visscher

CAMBRIDGE
INSTITUTE FOR FAMILY ENTERPRISE

PROGRAM TOPICS

The Multigenerational Wealth Model for a Family Enterprise:

- How the "right" wealth strategy helps achieve multiple family success goals including growing assets
- The ingredients for constructing a strategy for your family's multigenerational wealth creation and growth
- How the external world and today's turbulent environment shape a family's wealth building options and decisions
- CFEG's proprietary tools––that offer fresh, customized perspectives, metrics, and guides for growing your family's wealth
- Key financial and ownership considerations to be satisfied in a multigenerational wealth strategy, such as liquidity, control, growth, returns, purpose, and values

A Strategic Process for Developing a Family Wealth Strategy in this New Age

- How to construct a family wealth strategy to sustain through this turbulent era and into the next generations
- The options for building wealth over the next decades, and the tradeoffs, scenario-planning, and decisions required to deliberately grow value
- Talent and governance to guide your family enterprise wealth portfolio
- The Owners' Leadership Lens for guiding and directing family wealth from the owners' perspective

Long-term Success for Family Enterprise Wealth in this Turbulent Era

- How your wealth strategy must align with the requirements of family success in this new age
- Family Wealth Paths: how wealth travels and transforms over generations; how to move to or remain on the path you want to be on
- Family Success Model: key lessons of long-term family prosperity from families that endure for generations

REGISTRATION

WHO SHOULD ATTEND?

This program is designed for enterprising families that are ready to take a deep look at their family enterprise wealth portfolio from a multigenerational perspective. The program is an accelerator for families that are ready to design a wealth strategy to meet important family goals, realize the family vision, grow the family's wealth, and explore creating new sources of value now and into the next generations.

Participating families ideally have:

- Important financial liquidity with or without operating companies (now or soon)
- Some combination of operating companies and/or investments–such as direct investments, private equity investments, tangible assets, or liquid assets (now or soon)
- An interest in supporting community activities and/or giving back through philanthropy, social impact, impact investing, social entrepreneurship, or in other ways

TUITION

This is a live, online program offered during fixed dates and times. Participants attend live. No recordings will be made available.

November 10-12, 2021

- $2,600 (in U.S. Dollars) for the first participant, and
- $2,100 for each additional participant from the same family or company

Group participation of 3+ family members (plus advisors or managers if desired) is highly encouraged to absorb and discuss new strategies and concepts together. This leads to faster and more effective implementation after the program.

A common comment we hear from past participants in our programs is, "I wish I had brought more family members with me to this program."

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Take this opportunity to step away from your day-to-day activities, for three half-days, to reflect on your family's ambitions and make plans for building your wealth in deliberate ways. The frameworks, tools, and solutions provided in this program will help you grow the value your family wants to create and will help power your family enterprise through this turbulent era and into the next generation.

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