LIVE, ONLINE PROGRAM

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Compounding Your Family's Wealth: Building a Multigenerational Family Enterprise Wealth Portfolio

November 7-9, 2022
Daily 9:00 AM – 12:30 PM ET

A 3-day, Interactive Program to reimagine your family enterprise wealth portfolio strategy for the new economy.

FAMILIES NEED A WEALTH PORTFOLIO STRATEGY

In today's turbulent environment, a comprehensive wealth portfolio strategy is essential.

Deliberate wealth portfolio planning and construction, together with anticipating the family's future financial needs, is critical for motivating the family to advance to its next growth stage.

Importantly, a comprehensive wealth portfolio 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 across generations—many of which are easily overlooked in pursuit of financial gains.

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

PROGRAM TAKEAWAYS

In this program, you will:

- Gain insights into why the traditional wealth portfolio construction approach used by families is inadequate especially in today's volatile world
- Understand the characteristics of today's new era of turbulence that call for a new approach to wealth portfolio design and leadership
- Learn the ingredients for a family to build long-term value
- Learn the art of portfolio strategy for families – a structured, deliberate process that takes into account the vision and goals of the family owners and the changing needs and environment 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 in your family to grow your wealth portfolio, and key talent development strategies to use

FACULTY

Professor John A. Davis

François de Visscher

Matt Hively

Martin Liechti

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PROGRAM TOPICS

The Multigenerational Wealth Portfolio Model for a Family Enterprise:

- How the "right" wealth portfolio helps achieve multiple family success goals in addition to growing assets
- The ingredients for constructing a strategy for your family's multigenerational wealth creation and growth
- Simulations Models––using 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 portfolio strategy, such as liquidity, control, growth, returns, purpose, and values

A Strategic Process for Wealth Portfolio Construction in this New Age

- How to construct a family enterprise wealth portfolio to sustain through this turbulent era and into the next generations
- Processes to design the family enterprise wealth
- The visioning and strategy work required to design and grow a family enterprise wealth portfolio
- Talent and governance to guide your family enterprise wealth portfolio
- The Owners' Leadership Lens for guiding and directing a family enterprise wealth portfolio from the owners' perspective
- The Family Enterprise Leadership Concept: how to lead the right assets and activities in a family's wealth portfolio
- Governance required for a family enterprise wealth portfolio

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

- How your wealth portfolio 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

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 portfolio to meet important family goals, realize the family vision, grow the family's wealth, and explore creating other sources of value now and into the next generations.

Participating families ideally would 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.

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- $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 is highly encouraged to absorb and discuss new 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."

REGISTER HERE | CFEG.COM/WP22

Wealth Portfolio Strategy involves a design process based on dialogue and alignment among the family owners regarding vision and goals for the portfolio to achieve the family's wealth objectives.

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CFEG.com
Cambridge, Massachusetts USA
+1 617 871 1498 | @CambridgeFE

Questions? Contact Dina Dvinov at ddvinov@cambridge-institute.org or +1 617 871 1405