LIVE, ONLINE PROGRAM

Compounding Your Family's Wealth:

Building a Multigenerational Family Enterprise Wealth Portfolio

November 14-16, 2023

During our time together in this three-day program, you will learn how to design and lead your family's total wealth strategy. You will understand how to increase your portfolio's resilience in today's turbulent environment and through the next generation.

What does it take to build a resilient wealth strategy today?

Growing a family's *total wealth* over generations requires more than placing good bets.

It also calls for a number of critical ingredients such as a commitment to the aspirations and values of the family, an understanding of today's turbulent landscape and its risks and opportunities, understanding important family enterprise cycles, recurring investment in family talent, proper engagement of the next generation, the right governance oversight, and skills in the artful design of an agile wealth portfolio that generates lasting value.

These and other approaches and tools for growing wealth in the new economy are explored in-depth in the program.

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Faculty

Professor
John A. Davis

Matt Hively

Professor
Jason Jay

Martin Liechti

François de
Visscher

In this program participants will:

1 Learn how to design, lead, and oversee your family's wealth strategy for the new economy

2 Understand today's turbulent environment and the options, benefits, and risks for growing wealth in this context

3 Discover the pathways for building long-term value through understanding the several ingredients needed to build multigenerational wealth

4 Learn how to make wise decisions about selecting the right assets and activities that will power one's family wealth portfolio into the future

5 Understand the governance and talent that families need to develop or hire to execute and monitor their wealth strategy

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Program Topics

- The Multigenerational Total Family Wealth Approach for Family Enterprises
- A Strategic Process for Developing a Family's Total Wealth Strategy in this New Age
- Long-term Success for Family Enterprise Wealth in this Turbulent Era

Registration

Who should attend?

Enterprising families who:

Are ready to take a deep look at their family's total wealth portfolio from a multigenerational perspective, and consider changes to their portfolio and their approaches to building wealth

Own some combination of operating companies and/or investments—such as direct investments, private equity investments, tangible assets, or liquid assets (now or soon)

Have an interest in supporting community activities and/or giving back through philanthropy, social impact, impact investing, social entrepreneurship, or in other ways, since investing with a purpose is explored in this program

Teams of 3+ individuals are encouraged.

Tuition:

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

- $2,800 (in U.S. Dollars) for the first participant, and
- $2,300 (in U.S. Dollars) for each additional registrant from the same family, company, or family office.

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Questions? Contact Dina Dvinov
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