

# BEATING THE MIDAS CURSE

## CONTINUING EDUCATION WORKSHOP

### AGENDA

12:45 – 1:00 Welcome and introductions

1:00 – 3:15 Identifying the problem and solution:

- How many of you have seen a case in which money hurt someone in a family?
- How many of you have seen a case in which the money was squandered by the 2<sup>nd</sup> or 3<sup>rd</sup> generation?
- How many of you think that in either of those situations, that is what the person who worked so hard to accumulate the money planned?

***The Heritage Process™***: The bridge between traditional estate planning and preparing the heirs to receive their inheritance.

The 6 steps of The Heritage Process:

- Initial introduction
- Guided Discovery
  - Adult learning models (‘didactic’ vs. ‘Guided Discovery’)
  - Guided Discovery as distinguished from fact finding
  - Demonstration of Guided Discovery

3:15 – 3:30 Break

3:30 – 5:15

- The Vision Statement
  - Definition
  - Examples
- Implementing the Vision Statement: Building and facilitating the Implementation Team
- The Initial Family Retreat
  - Family mentoring
  - Family organization
- Ongoing Family Retreats
  - Family Councils
  - Family Banks
  - Family Philanthropy
- Summary and conclusion