



Family dynamics, education, & governance

Family Wealth & Culture Services offered through Wells Fargo Bank, N.A.

When it comes to managing and transitioning multigenerational family wealth, even the most comprehensive plan requires effective communication, an understanding of collective expectations, and preparation of the future stewards of the family wealth.

Planning at the intersection of money and family

Family Dynamics, Education & Governance supports you and your family on the path to achieving your wealth goals. Our team of Family Dynamics Specialists help facilitate important money conversations and advise on effective decision-making processes, along with educating and engaging the rising generation for leadership and wealth stewardship. Taking an intentional and proactive approach to wealth goals can help your family improve communication about legacy, foster alignment around family financial goals, prepare heirs, and develop a sense of shared purpose conducive to sustaining generational wealth.

Our capabilities include:

- **Family insights:** Individual and collective conversations to gather perspectives regarding your financial needs and goals.
- **Family meetings:** Best practices for effective meetings to discuss family wealth objectives and plans.
- **Family stewardship/skill development:** Educational sessions designed to inspire and prepare the next generation for wealth stewardship.
- **Family culture:** Guided conversations to align family values, purposes, and wealth goals.
- **Family enterprise:** Facilitated conversation on family wealth dynamics, governance, education and business transitions.

Customized advice and strategies

Based on your family's unique needs, characteristics, and opportunities, we deliver a range of advice designed to support your family's wealth goals and planning. This may include:

- Thought leadership on family dynamics, education and governance topics.
- Tailored workshops and experiential exercises to enhance individual and collective financial education and literacy.
- Consultation with Family Dynamics Specialists to help implement strategies in support of your long-term plan.

Better outcomes come with improved family dynamics

Through your Family Dynamics, Education, and Governance experience, your family can better navigate the intricacies of managing complex multigenerational wealth. You and members of your family can:

- Obtain individual and collective clarity through enhanced communication and decision-making.
- Reach greater cohesiveness and a better sense of alignment and purpose through education and facilitated conversations.
- Develop a plan for creating a meaningful legacy that articulates the principles that will guide the management of financial resources in line with your wealth goals.
- Create clear expectations and guidelines for joint decision-making related to the family enterprise.

Start planning your essential conversations today

Achieving your wealth goals is a process that requires time. Contact your advisor to learn more about how our Family Dynamics, Education, and Governance services can benefit your family.

[Conversations | Wells Fargo Conversations \(wf.com\)](https://wellsfargo.com/conversations)



Get started today

To learn about Wells Fargo Bank's Family Wealth & Culture Services, please contact your advisor.

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