



FAMILY ALIGNMENT DAY™

For many families, this day represents a turning point in the family which changes the dynamics and sustainability of their family.

It is the beginning of the journey of making your family thrive for multiple generations.

During your Family Alignment Day™, your family will define its purposes as a family, learn the various leadership and communication styles of the family members and how to enhance their communication, identify areas of common vision, and set priorities for the future. This day includes both education and exercises (heavily weighted toward exercises), and is facilitated by two Heritage Design Professionals™.

Prior to the Family Alignment Day™, the Heritage Design Professionals™ will have short telephone conversations with each of the participants. During those conversations, we will explain the desired outcomes and outline of upcoming day and answer any questions. As a result, everyone will walk into the room understanding the purpose and outline of the day, and having had their input about their desired outcomes for the day.

During the day, as a group, your family will:

1. Identify the purposes of your family and the value of keeping it together;
2. Learn a comprehensive and balance view of wealth (which is not just limited to money), and identify the value of being prepared to receive the financial wealth;
3. Understand why a vast majority of families fail to keep their family and wealth together for multiple generations (the “90% rule”), and the cure for that failure;
4. Identify the leadership and communication styles of each member of the family, and learn how to enhance communication within your family;



5. Identify 3-5 common values upon which you ALL agree – even if you did not think you had any common vision/values; and
6. Identify the purpose of your family’s financial wealth, and the value and benefits of keeping it within your family.

At the end of the day, you and your family will leave the day with a vision for what is possible, an understanding of the communication and leadership styles within your family and potential issues between styles with ways to improve them, a list of common values, and next steps you may want to take. Each family member will also walk away with the workbook they have completed, together with a much deeper understanding of the other members of your family.

Shortly after the day, you will receive a Memorandum from the Heritage Design Professional which will provide a summary of the day and the “next steps” that the family determined during the day, along with an outline of additional next steps your family may want to consider.

Your family will receive great value and a huge “return on investment” on each family member’s investment of both time and money into the day. In fact, many families have commented that this day was one of the most impactful days they have ever spent together.