



It's More Than Money: Protect Your Legacy

Patricia M. Annino

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It's More Than Money: Protect Your Legacy Is each generation of your family aware of the "family brand" - the foundational values you want them all to share? Have you discussed the objectives- in business or philanthropy or investments or family activities- that will translate these values into a family plan? Do you have the enabling structure (legal estate planning and business documents, financial investments and team of advisors) in place to carry out the plan? Most families cannot answer "yes" to all these questions. Directed at the "Captain of the Ship" the head of the family, but written in a way that is accessible to all interested family members, Its' More than Money explains how to: * Focus on what your values are. *Align those values with your goals. *Work with your team of advisors to put in place the legal documents and financial framework that wil.. *Protect you, yoru family, your charities and your legacy. This is both a how to do it blueprint and a handbook designed to provoke family discussion, understanding and unity.

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