



The Family Wealth Sustainability Toolkit: The Manual

Fredda Herz Brown, Fran Lotery

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An interactive assessment tool and companion manual for wealthy families and their financial advisors that analyze the behaviors and knowledge that impact a family's overall wealth, while also providing best practices needed for improvement. The Family Wealth Sustainability Toolkit gives wealthy individuals, family offices, and the financial planners, advisors and wealth managers who counsel them, the tools they need to better assess their wealth sustainability skills. One part assessment software tool and one part companion book, the online Index allows readers to assess their family enterprise across four dimensions of sustainability, while the Manual acts both as a roadmap to analyzing their results and provides a foundation in best practices. The index asks individual family members to assess how much the family, as a unit, utilizes best practices to help build structures, decision making processes, and leadership over generations. The manual shows readers how to reflect on what's working in their family to build and maintain sustainable wealth and how to fix what isn't. Throughout both components, the authors emphasize the importance of human, intellectual, and social capital, as well as financial capital, as drivers to sustainability over the long haul. The Family Wealth Sustainability Toolkit: * Helps affluent families and their advisors assess how well they are managing wealth now and for the future * Evaluates wealth sustainability practices to help readers find out what's working and what's not * Emphasizes the importance of human, intellectual, and social capital, as well as financial capital, in the quest for wealth sustainability Comprehensive and highly practical, The Family Wealth Sustainability Index carefully explains exactly how affluent families and their financial advisors can best utilize and prepare their wealth now and for generations to come.

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