

Many families have come to the realization that the accumulation of their financial wealth may become hurtful to their heirs, unless multi-generational communication identifies both shared values and a unified purpose to create a positive impact for this wealth.

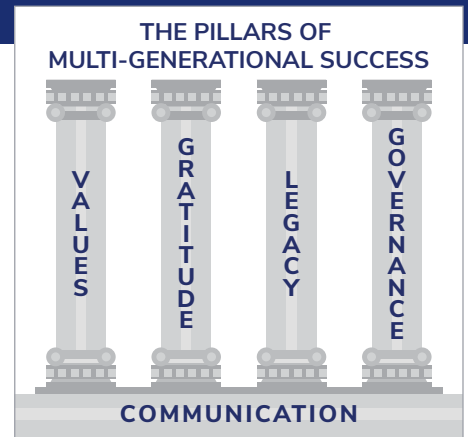
Until now, most families had no plan or process that would help address the foundational pillars that are essential to preparing heirs for financial wealth.

But through our “FamTecSM” MTM360SM platform, families now have the tools (in the palm of their hands) to work together on building the foundational framework from which future generations will benefit.

We have designed an introductory program to help both you and your children (or perhaps even grandchildren) understand the vision for how to create a shared purpose for the family wealth.

In just three 45-minutes Zoom sessions, with all age appropriate family members, a clear path to mitigating risks, improving family dynamics and preparing the next generation will be presented. More specifically:

- **Meeting One: The Vision of a Stronger Family Bond.** Learn the six ways to improve family unity, elevate meaningful communication, gratitude and empower all generations.
- **Meeting Two: The 3 Dimensions of Wealth: Personal, Social and Financial.** Topics will include core values, life experiences, shared stewardship, philanthropy and governance.
- **Meeting Three: The Wealth Transfer Preparedness Survey.** Every family will complete the survey, all results will be explained in detail and shared with your family for discussion.



The MTM360 SM Offerings	
Values360 TM	Legacy360 TM
Gratitude360 TM	Governance360 TM
Communication360 TM	



Vision360 is a one-time investment of \$6,000 and includes all your family members. We believe the cost/benefit analysis makes this a low barrier to entry into the most important part of your planning process – your family’s successful multi-generational wealth transfer.

For more information, call or email now:

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