

Team Approach for Family-Owned Businesses

Business Psychologist:


- Guiding the Succession - Building Family Bench Strength
- Facilitating Family Meetings & Family Councils
- Resolving Conflicts & Mending Relationships
- Crafting a Vision, Mission & Core Values
- High-impact Coaching to Facilitate the Development of Key Family Members & Leaders
- Solidifying Family Commitment to the Business
- Creating a Satisfying, High-performance Work Environment
- Developing Productive Teams
- Adopting Effective Communications Techniques & Influencing Skills
- Mastering Change to Produce Strategic Renewal of the Business

Financial Planner:

- Catalyst
- Collect Information
- Formulate Initial Analysis and Alternatives (with advisor input)
- Plan Presentation (Team)
- Implementation (Action Plan)
- Ongoing Relationship

Attorney & Accountant:

- Technical Tax & Estate Planning Input
- Participation in Planning Process
- Implementation of Legal Documents
- Ongoing Relationship



Our Goal
To Work as a
Team to Help You
Grow and
Protect Your
Family-owned
Business

