Family Business Advisor Training

Working Through Differences in Families That Share Business or Other Assets

As an advisor to enterprising families, there is something you need to know:

Managing conflict is the most important critical success factor for families that share ownership and management of business or other assets.

This practical training will help you:

- **Maximize** your service impact
- **Strengthen** your client relationships
- **Expand** your opportunities

Choose a half-day or full-day training to take the mystery, stress, and unexpected out of working with families who share significant business or financial assets.

Topics covered include:

- Finding and disarming landmines while navigating family dynamics
- Working effectively with multi-disciplinary advisor teams
- Developing effective multi-disciplinary process
- Differentiating your service in meaningful ways
- Staying relevant and engaged through client transitions and challenges
- Encouraging timely adoption of your advice and recommendations

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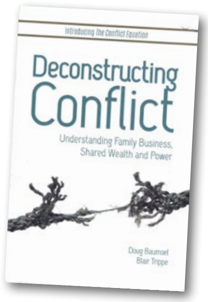
Understand all the moving parts within the organizations and relationships of the families you serve, so they can achieve their potential.

About Continuity

Continuity Family Business Consulting works with clients ranging in size from ultra-high net worth families and their companies to lower middle market firms.

Partners ***Doug Baumoel*** *and* ***Blair Trippe*** *are authors of the groundbreaking book* Deconstructing Conflict *and have more than 15 years of experience advising families who share business or other assets.*



Deconstructing Conflict looks at family business conflict, or conflict over shared wealth, as one example of a broader category of conflict: identity-based, systemic conflict among stakeholders who share important continuing relationships.

CONTINUITY™
FAMILY BUSINESS CONSULTING

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Who Benefits Most from This Training

This training can be tailored for professionals in these areas:

- ✔ **Attorneys:** Corporate, estate, family
- ✔ **Dispute Resolution:** Litigators, mediators, arbitrators
- ✔ **Financial:** Family office and wealth management, CFPs, CFAs, PE, M&A
- ✔ **Human Capital:** HR professionals, executive search firms
- ✔ **Franchise/Co-op Boards and Executive Teams**
- ✔ **Industry Vertical Resource Firms:** Real estate, entertainment, retail, manufacturing

Understanding Family Enterprise

Whether families are connected by wealth or an operating company, the potential for disagreement and the likelihood of getting stuck are high. Continuity's advisor workshop explains in clear, actionable terms how to work with complex, overlapping family and business systems and how your team can be more effective and increase your value to your clients.

When differences are managed well, the return on investment is very real—both for you as an advisor and for your clients.

Format

Trainings are available in half-day or full-day formats.

Pricing

Half-day training: $7,500

Full-day training: $10,000

Pricing does not include travel and other out-of-pocket expenses.

Also from Continuity

Conflict Management Training for Enterprising Families

A full-day program to help families that share business or other significant assets navigate differences that can derail business and harm relationships.

Workshops on:

- **Succession Planning**
- **Family Governance**
- **Planning an Exit**
- **Leadership Resolution**
- **Dispute Resolution Skills**

Maximize your impact on the families you serve.

Contact us to learn more or schedule your training: 617-500-3110 or email Ron at RSweet@ContinuityFBC.com