What We Do

We teach families to engage in the challenging conversations they are avoiding so they can strengthen trust and communication and enable their wealth to be a force for good in the family for generations to come. Our wealth-transfer experts partner with you to ensure that your next generations will prosper through wealth transition.

Research shows that 70 percent of estate transfers fail[1], despite excellent estate planning. When that happens, the family loses control of its assets and becomes divided. More than half the time, estate transfers fail because of a lack of trust and communication.

The biggest factor in preserving your legacy is the family relationships required to support your estate plan. Traditional estate planning is designed to take care of your *assets*, not your *family*. Working closely with you and your other advisors, we help you beat the high failure rate by co-designing a plan built on a strong foundation of high-trust relationships, effective communication and an aligned purpose.

Who We Are

For more than 50 years, we have been helping families answer the question, "How do I pass on this wealth so every member of the family and the business will thrive?"

Our family coaches and business consultants are uniquely trained experts in building and managing trust and communication so your family's wealth can successfully pass from one generation to the next, with family unity intact.

We have proudly served more than 300 high-net-worth families and have helped their businesses thrive throughout the United States and Canada.

How We Do It

1. We provide expert one-on-one and family-meeting coaching to prepare your family for wealth transition.
2. We teach you new strategies for relating to each other that build trust, coordinate effective action and manage conflict.
3. We facilitate challenging conversations so individuals are heard as contributors to a collective whole.
4. We support your vision for successful wealth transition and partner with you to have the challenging conversations inherent in families with great wealth.
5. We create a shared vision for the future and align your family values and roles into an action plan.

Because every family and its ventures have unique dynamics, we customize our solutions. We can include the entire family in our strategy, including spouses, grandparents, and children over the age of 16.

Our Three-Phase Process

The Williams Group Process™ involves three phases:

1. Assessment and recommendations
2. Awareness and learning
3. Alignment and implementation

We customize all phases to meet your family members where they are today and empower them to accomplish their goals with sustainable practices. We lead you in improving the quality of your family relationships, optimizing your family business and taking your family's philanthropic ventures to the next level.

We work on a meeting-by-meeting basis based to meet your family's needs for as long as the family is finding value. You can choose to discontinue the process at any time.

Our Fees

Our fees are based on a combination of a flat fee and an hourly billing structure. Please contact our office for more information. We look forward to working with you!

[1]. Roy O. Williams and Amy A. Castoro, *Bridging Generations: Transitioning Family Wealth and Values for a Sustainable Legacy* (Oviedo, Florida: HigherLife Publishing, 2017), 177.