



The
UHNW
Institute

Resource Toolkit

Edition | Legacy Toolkit



Videos

The UHNW Institute logo is in the top left. Below it, the text reads: **VIRTUAL ROUNDTABLE DISCUSSION**, **LEADING WITH LEGACY: DISCOVERING THE VOICE & SHARED PURPOSE OF THE MULTIGENERATIONAL FAMILY**, **Thursday, December 7**, **4:00 – 5:30 p.m. ET**. On the right side of the thumbnail, it lists: **MODERATOR** AMY HART CLYNE, and **PARTICIPANTS** STEPHEN D. SMITH, DR. RICK STEVENSON, STAN TREGER, DUNE THORNE. At the top right of the thumbnail are five small circular portraits of the participants.

Leading with Legacy: Discovering the Voice & Shared Purpose of the Multigenerational Family UHNW Institute Roundtable

Explore how firms connect family stories to purpose so you can support multigenerational families in finding a collective voice and shared purpose, enhancing connectivity and family dynamics.

The UHNW Institute logo is in the top left. Below it, the text reads: **EVENT RECAP**, **The UHNW Institute 2022 Symposium Recap**, and **A Roadmap to 2030 – Serving the 100-Year Multigenerational Family**.

Importance of EQ in the Family-Advisor Relationship from the 2022 UHNW Institute Symposium with Dr. Rick Stevenson

The importance of emotional intelligence in telling the most important story we'll ever tell: our own.

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Podcasts



Episode 64: Using the Ikigai Model to Foster a Legacy of Meaningful Engagement

Wealth of Wisdom Podcast

Don Opatrny and Keith Michaelson explore how the Ikigai Model can foster character, competence and contribution in life.



Episode 35: What Are the Key Considerations in Crafting Your Legacy?

Wealth of Wisdom Podcast

Tom McCullough discusses how to craft your legacy with Thayer Willis.



Episode 70: Finding What's Next for Your Family

Wealth of Wisdom Podcast

Bart Parrott discusses how to help families find "what's next" after a significant change.



Episode 80: Identifying Actionable Values for Family and Enterprise & Strengthening Your "Family Factor" to Deconstruct Conflict

Wealth of Wisdom Podcast

Blair Trippe and Doug Baumel delve into the "Family Factor" concept for deconstructing family conflicts.



Episode 85: Finding a Philanthropic Focus and Integrating the Rising Generation Perspective

Wealth of Wisdom Podcast

Etienne Eichenberger and Malgorzata Smulowitz discuss the importance of a "Family Philanthropy Navigator."



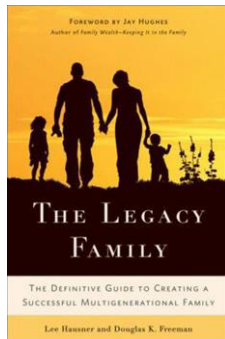
Book List



Finding Her Voice and Creating a Legacy: Portraits of Pioneering Women Leading Wealthy Families

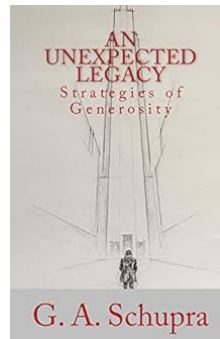
by Amy Hart Clyne & Dennis T. Jaffe

A collection of universal and profound stories from a unique group of women navigating triumphs, tribulations, fortunes and legacies, providing key insights for female leaders in family enterprises.



The Legacy Family: The Definitive Guide to Creating a Successful Multigenerational Family **by Lee Hausner & Douglas K. Freeman**

A roadmap for detailing how to leave family wealth and legacy intact.



An Unexpected Legacy: Strategies of Generosity **by G. A. Schupra**

Case studies and conversations that explore principles and strategies for meaningful philanthropic planning.



Articles



The **UHNW** Institute

Bridging the Gap: How a Family Documentary Educates Rising Generations

by Lori Z. Roux

This article outlines the benefits of family documentaries and provides easy steps to initiate the preservation of family histories.



Using A.I. to Talk to the Dead

Explores the use of artificial intelligence chatbots and other technology to remember departed loved ones.



Harvard Business Review

How to Build Upon the Legacy of Your Family Business — and Make It Your Own

How rising generations can keep a sense of purpose and ownership in family legacies across time.



The **UHNW** Institute

Strategic Philanthropy | Leaving a Philanthropic Legacy

Explains how proactive legacy planning is essential for philanthropic individuals.



Reports



The Enduring Legacy of Business Families

This report, part of the 2019 KPMG/STEP Project global study, explores the legacy of successful family enterprises.



Toolkit



StoryFile

Conversational video technology that captures your story in perpetuity.



StoryQ

Guides you in connecting the dots of your life through expertly guided personal film interviews, offering a deeper understanding and authority over your ever-unfolding story.



Whole Story Productions

Creates custom family legacy video biographies.



Artifact

Personal podcasting to communicate your story.



Artifects

A digital platform to organize and preserve memories, capturing the meaning behind objects through secure documentation and sharing of their history and life moments.



Best of Legacy

A memory book of press clippings, pictures and flat screen video to wow family members.



Biograph

Transform your voice into stories in a revolutionary storytelling experience.



Best of Legacy

Preserves multigenerational family stories and business histories in limited-edition heirloom books.



Personal Legacy Advisors

Conversation starters to encourage deeper communication and connection.



StoryWorth

Preserve meaningful moments and memories in a beautiful keepsake book.