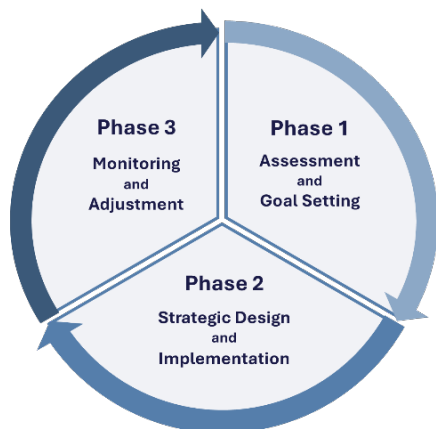


The AIM Framework™

A Structured Approach for Family Wealth Collaboration



Seasoned advisors are familiar with the patterns and rhythm of effective client work within their areas of expertise. What they may not recognize is the shared cycle that drives progress—not just within their discipline, but across the work of other specialists. While they follow these patterns instinctively, they may lack a clear, consistent way to collaborate with other specialists or to explain the patterns to clients.

The AIM Framework¹ offers that structure and formalizes the professional services needed to support complex client families. Using a shared language grounded in integrated wealth management, it organizes the advisory process into three clear

phases: **Assessment, Implementation, and Monitoring**. This structure helps clients and advisors work together more effectively by defining shared responsibilities and establishing repeatable processes that support long-term planning. At its best, the AIM Framework fosters integrated decision-making among multiple specialists and across the Ten Domains of Family Wealth™, ensuring each step is intentional, collaborative, and impactful.

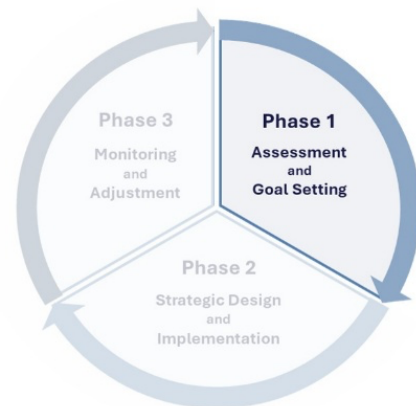
Three Phases, One Unified Approach

Phase 1: Assess, Perform Discovery, and Set Goals

Advisor Responsibilities: Lead efficient discovery, analyze needs, and coordinate the advisory team

- Conduct interviews and review key documents to understand the family's values, needs, and long-term goals
- Assess broader requirements across the family enterprise, including businesses, trusts, and foundations
- Identify required specialists and align the advisory team accordingly
- Translate early insights into proposed goals and an initial project roadmap

Family Responsibilities: Share goals, values, and history openly; collaborate on priorities and team selection; provide timely responses and communication



¹ The AIM Framework was originally known as the Multiphasic Service Model (MSM).



Phase 2: Design and Implement Strategies and Solutions

Advisor Responsibilities: Design and implement a comprehensive plan tailored to the family's goals

- Build and document strategic solutions
- Set up structures, systems, and processes
- Collaborate across advisory roles to ensure alignment
- Pilot and finalize operational components

Family Responsibilities: Collaborate to understand the rationale behind project plans, co-design and pilot strategic solutions, and engage key members to foster alignment across generations.



Phase 3: Monitor & Adjust Systems to Maintain Effectiveness

Advisor Responsibilities: Ensure the plan remains effective and evolves with the family and environment across time and circumstance.

- Track progress and compare to benchmarks
- Adjust strategies in response to changes internal or external to family
- Maintain regular communication with family and stakeholders
- Refresh and redesign as needed—return to a new phase 1 when circumstances necessitate major changes

Family Responsibilities: Stay actively informed and involved by providing oversight and feedback and re-engaging when significant changes call for new strategies.



Integrated Wealth Management in Action

Built on the best practices of firms that prioritize service integration, the AIM Framework operates as a unified system. Its three phases support seamless collaboration, coordinated project leadership, and clear communication. By aligning specialists under the guidance of experienced generalists, AIM breaks down silos and delivers strategies that evolve with the family's needs, creating a truly integrated wealth management experience.

Ready to Learn More?

Explore how the AIM Framework can elevate your approach to family wealth advising. Contact us at librarian@uhnwinstitute.org.