

# The UHNW Institute Beneficiary Stories Initiative

The UHNW Institute believes the most transformative insights in wealth management don't live in spreadsheets—they live in stories. One story we rarely hear, yet absolutely need, is the beneficiary experience: what it feels like to receive wealth, to inherit expectations, and to grow into stewardship.

Today, we're inviting your firms—and the families you serve—to join us in the **UHNW Institute's Beneficiary Stories Initiative**.

## What is the Beneficiary Stories Initiative (BSI)?

This initiative is a curated series of short audio and video conversations with beneficiaries and inheritors who are willing to share, candidly and thoughtfully, what the journey has been like for them.

## What's in it for firms and families?

We're all in this together. When we encourage beneficiaries to speak, their voices help shift the industry from assumptions to insight, from transactional support to truly holistic guidance.

Your involvement in this Initiative will provide the following opportunities:

- Insight to support the families we serve
- Early access to the research we collect and presentations we share with members
- Invitations for client participants to select Institute events, including the annual Women's Leadership Summit and more.

## The GOAL of the BSI.

Our goal is not to spotlight wealth—it's to humanize the experience and surface wisdom that rarely makes it into the room and inform the work of professionals in the field.



**The Beneficiary Stories Initiative offers a practical compass for peers, and a powerful lens for advisors. Together, let's ensure the next chapter of wealth is guided by the voices of those who live it.**



PITCAIRN

## Why the industry needs it.

*Succession. Billions. Trust.* We need portrayals that go beyond the media-hyped wealth, power and privilege vantage point. The beneficiary journey is often private, complex, and easily misunderstood. People navigate shifting family dynamics, public and private identity, stewardship expectations, and the challenge of finding purpose amid privilege.

When beneficiaries speak in their own words—about what prepared them, what surprised them, the lessons learned as they reflect back and what they wish they'd known—they offer a practical compass for peers, and a powerful lens for advisors. Your teams will see where we help most—and where silence or structures alone aren't enough.

## If it will be shared, how is it confidential?

We're conducting interviews with the utmost care and sensitivity.

- Conversations are recorded in a private, interview-style setting with Amy Hart Clyne and Dennis Jaffe.
- Participation is voluntary and fully consent-based.
- Each participant has the opportunity to review and edit their audio or video to their comfort level before anything is shared or archived in the UHNW Institute Resource Library.

## Join Us.

Invite your client families to consider sharing a story.

To connect a potential participant or learn more, please reach out to Angelique LeDoux at [aledoux@uhnwinstitute.org](mailto:aledoux@uhnwinstitute.org).



## THE BSI TEAM

The UHNW Institute is proud to have Pitcairn, our educational sponsor for this Initiative. Amy Hart Clyne, Pitcairn's Chief Knowledge & Learning Officer and Dennis Jaffe, Senior Research Fellow at Banyan Global are the co-authors of *Finding Her Voice and Creating a Legacy*. The book helped shape conversations that move beyond technical transfer toward human continuity—identity, purpose, voice, and belonging within a legacy. Angelique LeDoux, the Institute's managing editor of content, serves as project coordinator. Learn more about the BSI Storytelling team below.



**AMY HART CLYNE**  
Chief Knowledge &  
Learning Officer, Pitcairn



**DENNIS JAFFE**  
Senior Research Fellow,  
Banyan Global



**ANGELIQUE LEDOUX**  
Managing Editor,  
The UHNW Institute

