

# The Legacy Generational Wealth System™

A framework for making wise choices that will serve you for a lifetime.

## LEADERSHIP

Clear vision and direction

## GOVERNANCE

A process for preserving the past, managing the present and envisioning the future over multiple generations

## MANAGEMENT

Maintaining simplicity and convenience

## Problem Solving

## THE CORE TEAM

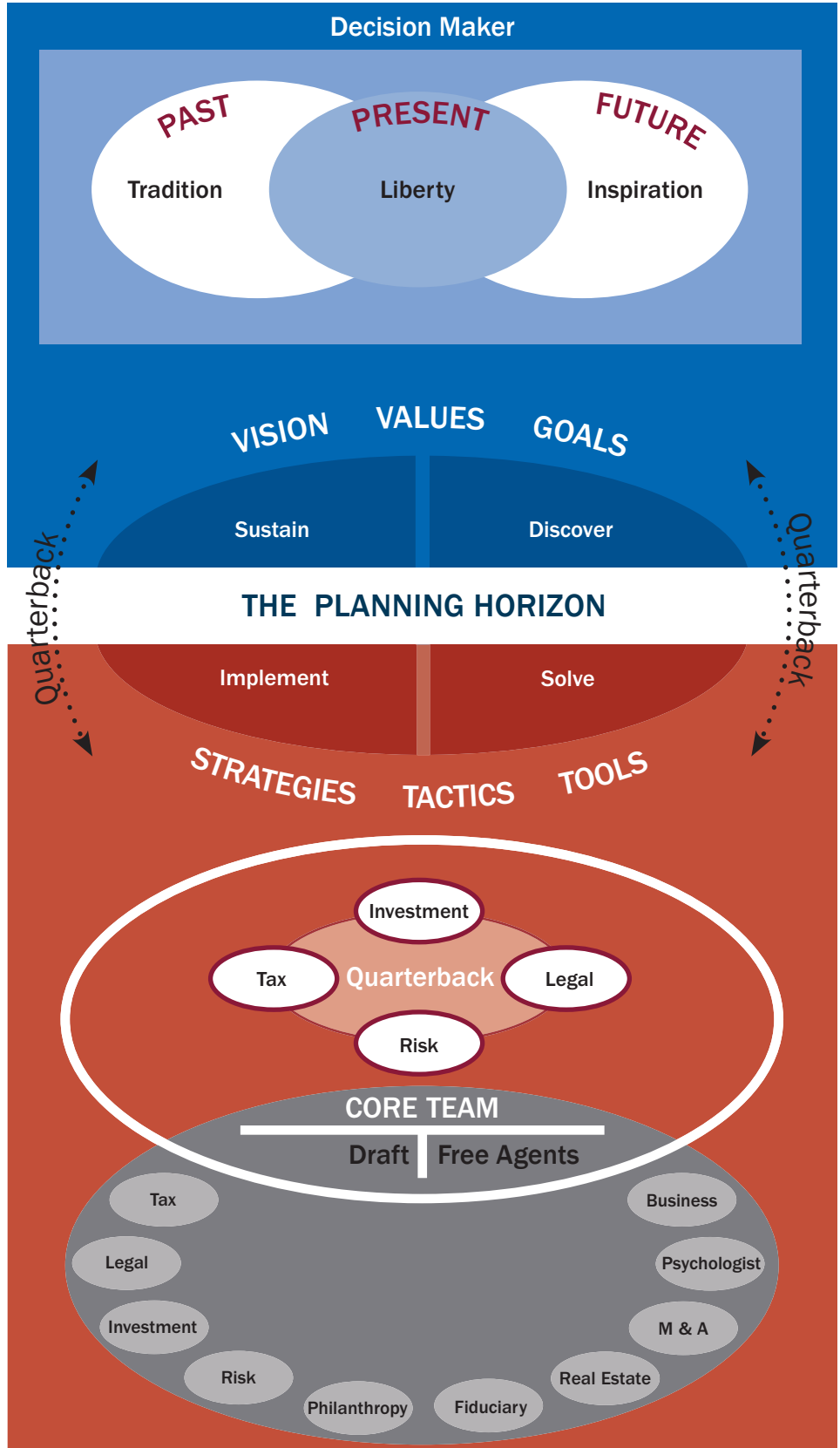
Stability, context and counsel from a trusted team

## THE STRATEGY DESIGN TEAM

The right talent, for the right problem, at the right time

## THE VIRTUAL TEAM NETWORK

Access to an unlimited pool of talent



# The Legacy Generational Wealth System™

## LEADERSHIP

Vision  
Values  
Goals

## GOVERNANCE

Stewardship  
Perspective  
Continuity  
Context  
Adaptation

## MANAGEMENT

Discovery Management  
Gap Management  
Information Management  
Communication Management  
Knowledge Management  
Budget Management  
Project Management  
Team Management  
Talent Management  
Results Management

## THE CORE TEAM

Client Advocate  
Strategy Filter  
Strategy Inventory

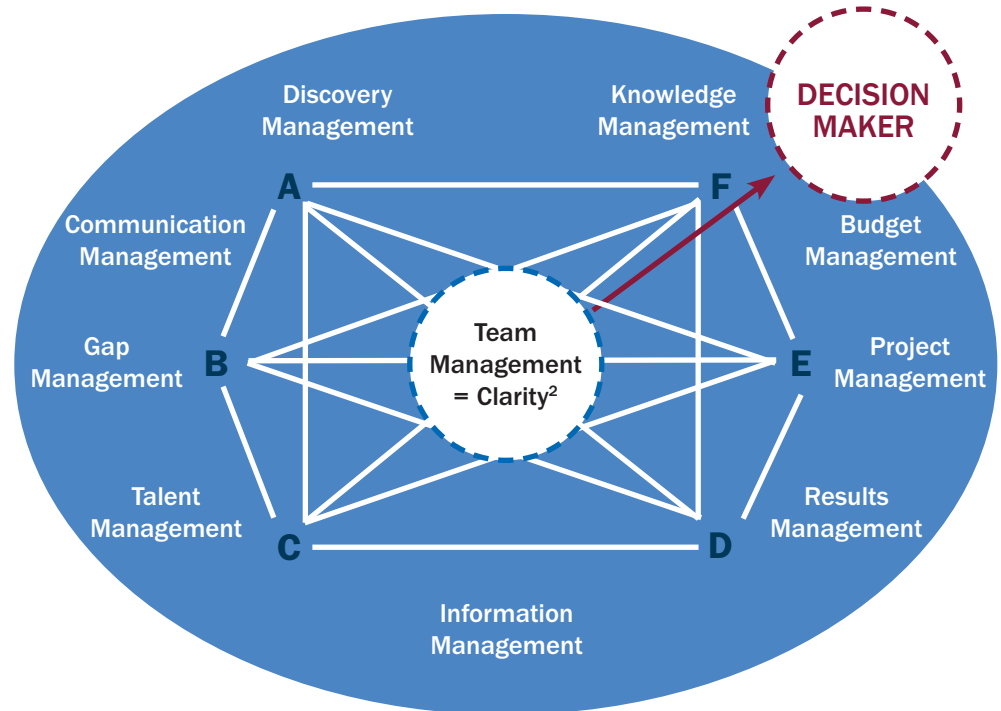
## THE STRATEGY DESIGN TEAM

A “Virtual” Team  
Maximize Unique Ability  
Build Conative Synergy  
Clarity<sup>2</sup>

## THE VIRTUAL TEAM NETWORK

Specialty Solutions  
Proprietary Solutions  
Exotic Solutions  
Unknown Solutions

## CLARITY<sup>2</sup> MODEL



- The two greatest costs associated with planning are (1) indecision and (2) bad decision.
- An incompetent team of advisors will likely produce a poor decision.
- A competent team lacking clarity or management will likely produce a poor decision at a very high cost.

By articulating one’s vision, values and goals, a Strategy Design Team and Virtual Team Network will work towards providing a clear, unified result. If team members are connected to each other with the same information and effective communication, you will achieve Clarity<sup>2</sup> – a team synergy that is exponentially greater than the sum of its parts.