



## Family & Business History

*History can be a valuable tool for sharing your family's values and wealth goals. Past generations may have experienced prosperity, financial scarcity, or a significant change in fortune. There may have been times when they needed aid, and times when they helped others. Consider sharing these meaningful stories to enhance your family legacy.*

### Enhancing the connection between money and meaning

For a family to succeed over generations, communication about wealth and values can be vital. Our Family & Business History specialists can advise you on strategies for expanding knowledge of your historical roots. Through this exploration, you will reflect on your family story and contemplate your current financial goals and wealth plans. By linking past and present, you can carry your family's vision, values, wisdom, and wealth forward to inform future generations as part of comprehensive financial education.

Your family can benefit from our expertise on these topics:

- **Family history experience:** Explore your most important stories emphasizing financial journeys, periods of hardship and success, and the perpetuation and evolution of family values.
- **Preservation of family memory and legacy:** Capture, curate, and safeguard family stories through oral history, photographs, documents, and other heirlooms.
- **Business heritage:** Develop strategies for leveraging history to help inform your business plans or transitions.

## Customize advice and strategies

Based on your family's unique characteristics, needs, and opportunities, we deliver a range of advice designed to support your family's wealth goals and planning.

This may include:

- Thought leadership on family history, capturing memories, and engaging rising generation family members.
- Conducting personalized historical research and delivering findings as part of family meetings.
- Consultation with family history specialists to support multigenerational wealth education.

## Achieve better outcomes by telling and retelling your story

By partnering with Family & Business History to build and communicate your unique history, you and members of your family can:

- Establish family identity and reinforce a sense of purpose and values.
- Build cohesion, helping family members feel like they are part of something greater than themselves.
- Define family responsibilities and help each member identify their contributions to the family.
- Provide a well of resilience across generations. Those who know that their family has endured and overcome challenging times may gain confidence that they will, too.

## Start planning your essential conversations today



Let us help you discover the memorable stories that can influence your family's understanding of wealth. When you're ready to talk, we're here. Contact us for more information and to learn about how we can assist you at [www.roseategroup.com](http://www.roseategroup.com).

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