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Bridging Generations Transitioning Family Wealth

Bridging the Generations – Transitioning Family Wealth and Values for a Sustainable Legacy

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provides you with insight, strategies and compelling stories on how your wealth can be successfully passed on from one generation to the next with the family unity intact.

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Bridging Generations: Transitioning Family Wealth and ...

Bridging Generations is an indispensable guidebook for those families.”-Neil Douthat, CPWA, Senior Vice President, Wealth Management UBS Financial Services Inc. As the baton of the family business and wealth is passed, millennials today find themselves stepping into larger, more complex organizations in a marketplace characterized by swiftly changing global forces.

Bridging Generations - Transitioning Family Wealth and ...

Most families fail to transfer their wealth onto their kids and heirs, Amy Castoro of The Williams Group explains. In today's Lifetime Income podcast, we interview Amy about her new book, Bridging Generations (buy on Amazon by clicking here), on why so many families have trouble and the steps that can be taken to help make that transition successful.

Amy Castoro on Bridging Generations: Transitioning Family ...

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Bridging Family Wealth Generation to Generation

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Family-owned businesses considering future transitions must establish trust and communication between family members and other participants in the business, said Amy Castoro, president and CEO of The Williams Group, a consultancy in San Clemente, Ca., and the author of, "Bridging Generations: Transitioning Family Wealth and Values for a Sustainable Legacy."

Preparing to Transition the Family Business to the Next ...

Bridging the Family Business Generation Gap. The transition from one generation to the next can make or break a family business; and as the 'baby boomers' hand over to the 'millennials', the risks of getting it wrong have never been greater.

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Amy Castoro is president and CEO of The Williams Group, a family coaching and consulting firm, and co-author of Bridging Generations: Transitioning Family Wealth and Values for a Sustainable Legacy.

4 Tensions in Family Businesses — and How to Work Through Them

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