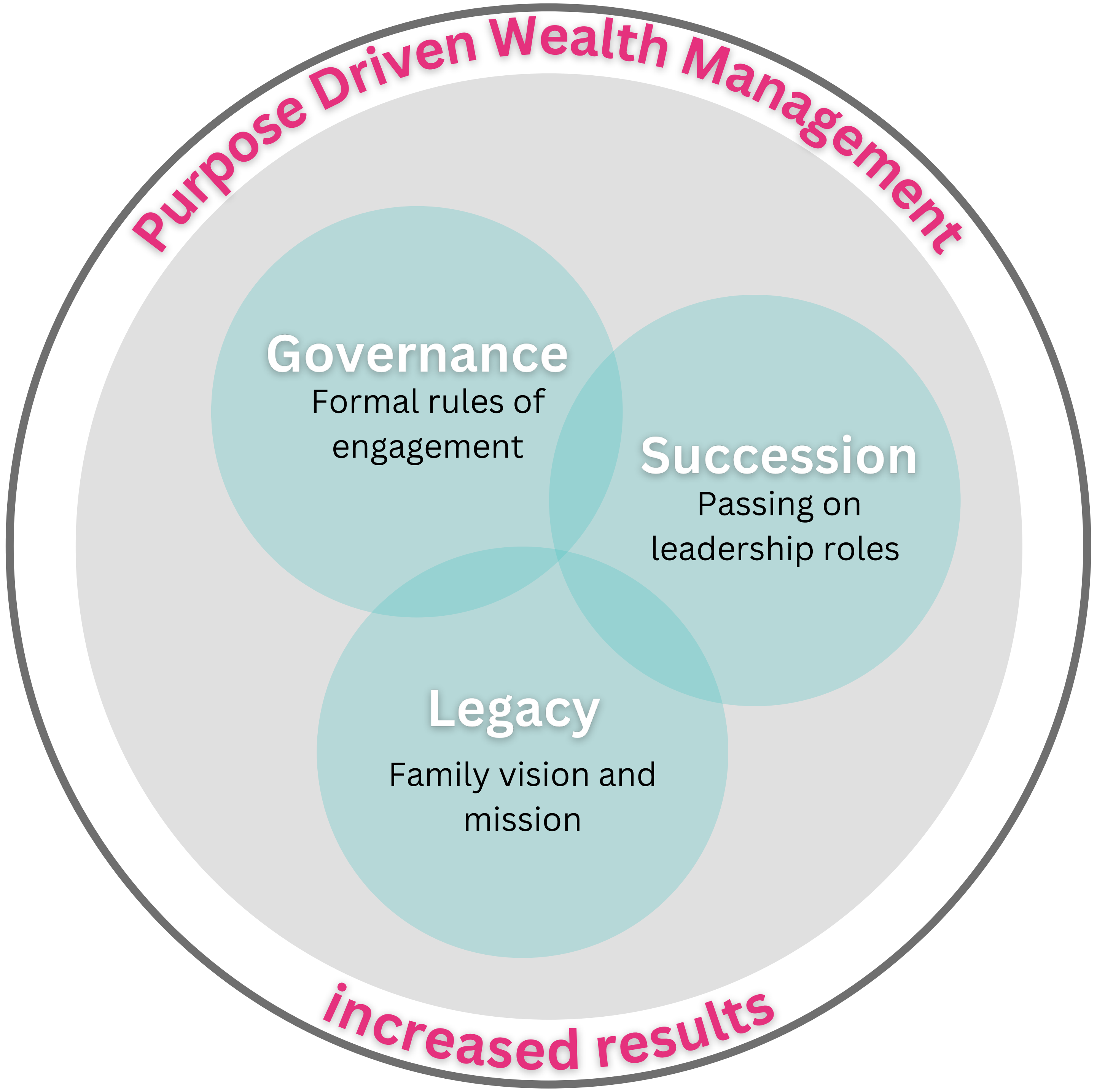
PURPOSE DRIVEN WEALTH MANAGEMENT

Sustaining Multigenerational Wealth Through Evidence-Based Solutions.

Offered by DR. FOSTER



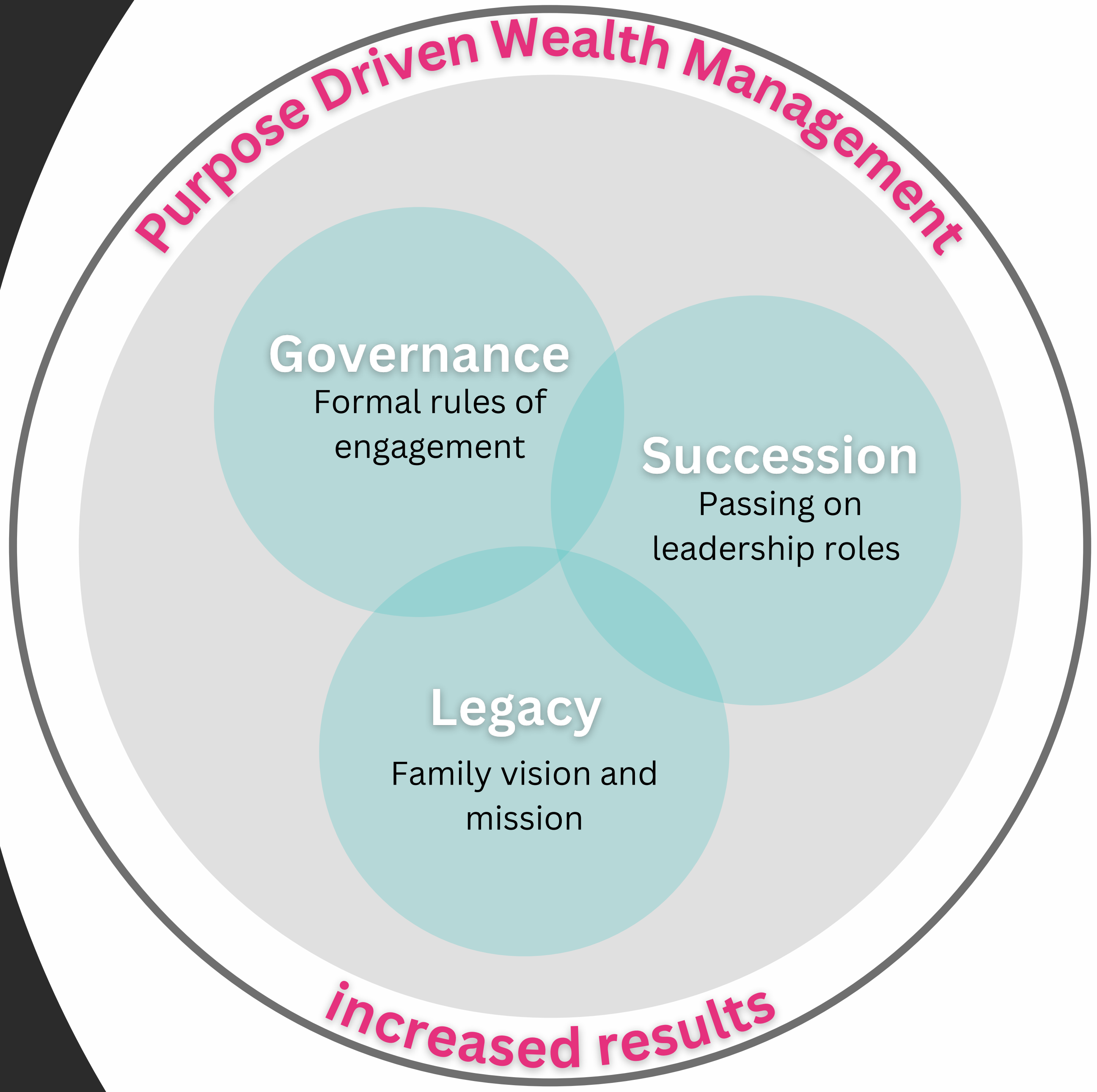
PROBLEM: Research shows 70% of high net-worth families do not successfully transfer wealth beyond the 3rd generation often due to a lack of education on how and when to effectively communicate about estate planning, business transition, and family culture.

SOLUTION: Purpose Driven Wealth Management is an evidence-based planning solution tool to aid wealth Planning teams. Helping families sustain their wealth across generations, by facilitating decision-making around the complex issues that arise as a result of considerable wealth.

Purpose Driven Wealth Managment

Strategic solution of applying evidence-based assessment techniques to quantify and qualify a client's unique financial planning as it relates to wealth goals. Sustains multigenerational wealth by increasing effective decision-making around, governance, legacy planning, and succession.

- Harmonious and productive family meetings
- Successful transition of generational ownership to create family enterprise
- Design and implementation of multigenerational succession
- Agreed upon constitution based on mission, vision, and priorities



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Demonstrated Successful Outcomes

Metrics

↑ Loans up 23% ↑ Assets under management up 34% ↓ Expenses down by 33%

↑ Deposits up 6% ↑ Revenue up 26%

Testamonials

Proven Results

“Dr. Foster has done an extraordinary job training and consulting for the executive leadership for our family office. The impact on both the individuals and the family dynamics for the office was significant. My “future leaders” gained a better understanding of themselves, their drivers and the impact they have on others. They developed more of a leadership approach to their thinking and interactions vs the traditional “management” style. The combined effect has led to: more collaborative strategic planning, increased sales, increased revenue, and closer personal relationships within the office. Specifically, Dr. Foster’s time with my family and wealth planning team helped to position and transition a next gen member into a team leader/manager and align the rest of the office toward self-sufficiency.”

- Head of Family Office, Succession Planning

TESTAMONIAL

PROVEN RESULTS

"I have known and worked with Dr. Foster for 8 years. I was skeptical Dr. Foster could do something different for the very senior managers in our organization. At the end of this very successful day, the executive let his managers know that they could use Erin's services for each of their wealth planning teams (this division has over 300 colleagues), but did not make it mandatory. Every single market manager in the room reached out to her.

As impressed as I was after the first meeting, that was nothing compared to what came next. Erin met with each manager and created a tailored made plan, based on the needs of each team's UHNW clients. As she was working her way through each market the teams under these region managers asked if they could reach out to Erin to do some work with the smaller teams to increase client engagement.

Her success in this organization happened simply because she built trust, listened, and delivered results. As she gained the trust of our teammates, she was able to make suggestions and offer creative solutions to wealth management and our colleagues (even our most skeptical) utilized her because they trusted her."

- HEAD OF HUMAN RESOURCES, PRIVATE BANK, BEHAVIORAL ANALYSIS TRAINING

DR. FOSTER

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