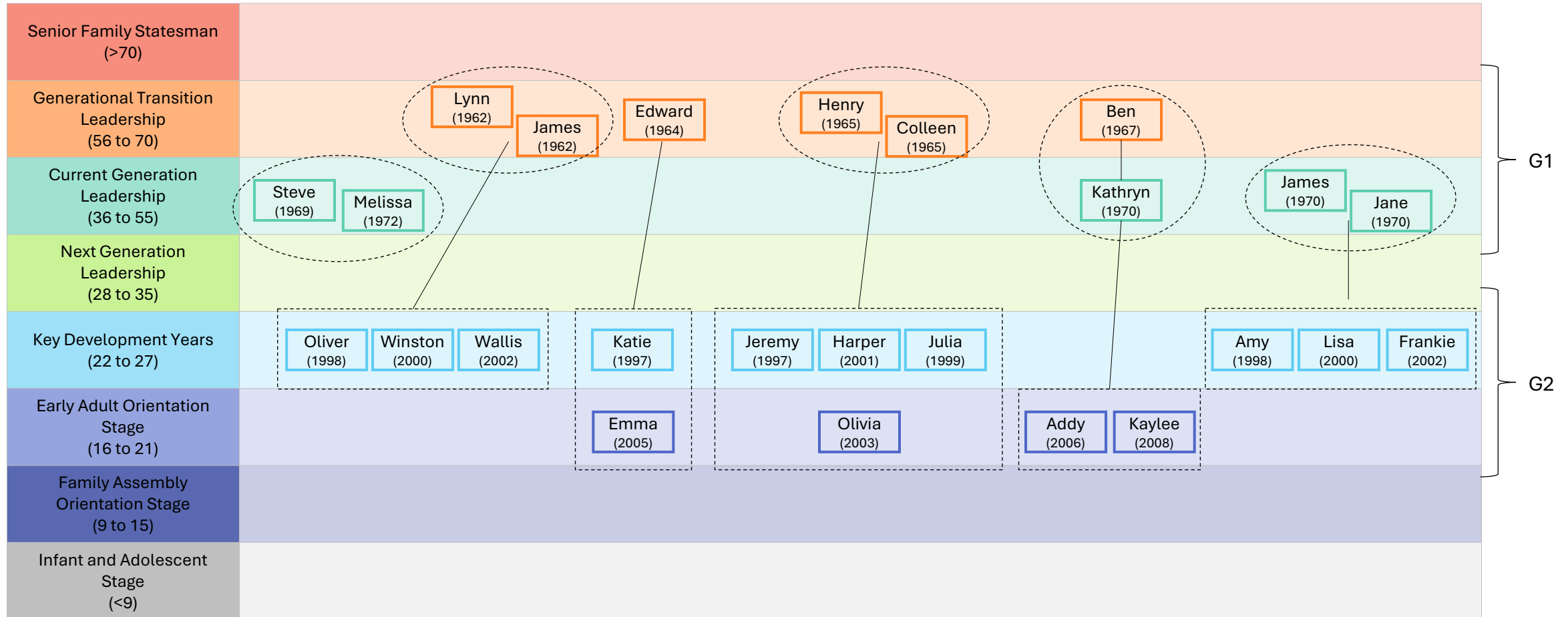
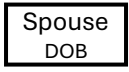
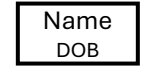


Owner Age Cohorts

Senior Family Statesman (>70)	
Generational Transition Leadership (56 to 70)	
Current Generation Leadership (36 to 55)	
Next Generation Leadership (28 to 35)	
Key Development Years (22 to 27)	
Early Adult Orientation Stage (16 to 21)	
Family Assembly Orientation Stage (9 to 15)	
Infant and Adolescent Stage (<9)	

<p>Senior Family Statesman (>70)</p>	<p>Advisory Role and Family Legacy Key Learning Objectives:</p>	<ul style="list-style-type: none"> • • • 	<p>GOAL: “Continuing the family business.”</p>
<p>Generational Transition Leadership (56 to 70)</p>	<p>Legacy Building and Mentorship Key Learning Objectives:</p>	<ul style="list-style-type: none"> • • • 	
<p>Current Generation Leadership (36 to 55)</p>	<p>Fulfillment, Purpose, and Lifelong Learning Key Learning Objectives:</p>	<ul style="list-style-type: none"> • • • 	
<p>Next Generation Leadership (28 to 35)</p>	<p>Personal Mastery and Community Impact Key Learning Objectives:</p>	<ul style="list-style-type: none"> • • • 	
<p>Key Development Years (22 to 27)</p>	<p>Self-Discovery, Life Skills, and Professional Development Key Learning Objectives:</p>	<ul style="list-style-type: none"> • • • 	
<p>Early Adult Orientation Stage (16 to 21)</p>	<p>Developing Personal and Professional Skills Key Learning Objectives:</p>	<ul style="list-style-type: none"> • • • 	
<p>Family Assembly Orientation Stage (9 to 15)</p>	<p>Basic Financial Literacy and Family Business Awareness Key Learning Objectives:</p>	<ul style="list-style-type: none"> • • • 	
<p>Infant and Adolescent Stage (<9)</p>	<p>Introduction to Family Values and History Key Learning Objectives:</p>	<ul style="list-style-type: none"> • • • 	

Owner Age Cohorts



<p>Senior Family Statesman (>70)</p>	<p>Advisory Role and Family Legacy Key Learning Objectives: Serving as a family advisor and maintaining an honorary role. Ensuring the family’s legacy is preserved and respected. Supporting the generational transition and providing historical perspective. Engaging in philanthropic efforts or family foundation activities.</p>	<ul style="list-style-type: none"> Regular advisory meetings where senior statesmen offer counsel on major decisions. A legacy project where seniors document their journey and lessons learned (i.e. “Out Of The Box”). Participation in family philanthropic activities, sharing the values of giving back.
<p>Generational Transition Leadership (56 to 70)</p>	<p>Legacy Building and Mentorship Key Learning Objectives: Passing down knowledge and wisdom to younger generations. Focusing on legacy and long-term impact of the family business. Ensuring the family’s values and mission continue through future generations. Preparing for a transition to a more advisory role.</p>	<ul style="list-style-type: none"> Legacy planning workshops, focusing on philanthropy, family values, and impact. Structured mentorship programs where leaders pair with next-gen family members. Roundtable discussions on preserving family culture and ensuring smooth transitions.
<p>Current Generation Leadership (36 to 55)</p>	<p>Fulfillment, Purpose, and Lifelong Learning Key Learning Objectives: Focus on enhancing strategic leadership skills to ensure long-term growth and sustainability in personal and professional endeavors. Master financial stewardship by focusing on wealth management, estate planning, and creating a financial legacy for future generations.</p>	<p>GOAL: “Happy, thriving, members of society pursuing their own personal passions.”</p> <ul style="list-style-type: none"> Participants engage in discussions and workshops that cover topics like intergenerational wealth transfer, tax-efficient strategies, and establishing family foundations or charitable funds.
<p>Next Generation Leadership (28 to 35)</p>	<p>Personal Mastery and Community Impact Key Learning Objectives: Develop advanced leadership skills to navigate complex decisions, manage conflict, and lead teams with confidence and emotional intelligence. Deepen financial knowledge, focusing on long-term financial planning, investment strategies, and wealth management. Learn how to balance career progression with personal fulfillment, maintaining well-being and pursuing passions while avoiding burnout.</p>	<ul style="list-style-type: none"> Engage in a real-world leadership simulation where they must navigate a complex scenario (e.g., managing a team through a crisis or making strategic business decisions). Personal wealth planning workshop. A retreat where participants explore strategies to achieve work-life integration through mindfulness practices, time management techniques, and goal setting.
<p>Key Development Years (22 to 27)</p>	<p>Self-Discovery, Life Skills, and Professional Development Key Learning Objectives: Encourage exploration of personal interests, values, and strengths. Equip with essential financial management skills, including budgeting, saving, and basic investing. Develop transferable skills such as networking, communication, and leadership. Promote habits that support long-term physical and mental health, emphasizing work-life balance, stress management, and resilience.</p>	<ul style="list-style-type: none"> Strengths or values assessment (e.g., CliftonStrengths) Financial simulation game with mock salary, expenses, and investment options. Map out a 5-year career roadmap that outlines the skills, experiences, and connections necessary to achieve their professional goals. A guided session on mindfulness techniques such as meditation, breathwork, and stress management strategies.
<p>Early Adult Orientation Stage (16 to 21)</p>	<p>Developing Personal and Professional Skills Key Learning Objectives: Understanding the family business structure and key business concepts. Personal development (leadership skills, public speaking, networking). Participation in internships or shadowing opportunities within the business.</p>	<ul style="list-style-type: none"> Workshops on public speaking and personal branding. Panel discussion with family members and business leaders sharing their career journeys. Introduction to business basics: finance, marketing, and operations, tailored to their interests.
<p>Family Assembly Orientation Stage (9 to 15)</p>	<p>Basic Financial Literacy and Family Business Awareness Key Learning Objectives: Introduction to the family business and its importance. Basic financial literacy (saving, budgeting, understanding money). Encouraging participation in family business-related activities or projects.</p>	<ul style="list-style-type: none"> A fun, interactive "mini-economy" where kids earn and spend play money. A tour of business facilities (virtual or in-person), followed by a Q&A session. Group project to create a simple business plan for a mock product or service (i.e. lemonade stand).
<p>Infant and Adolescent Stage (<9)</p>	<p>Introduction to Family Values and History Key Learning Objectives: Understanding basic family values and traditions. Exposure to the concept of business and ownership through stories and games. Participating in simple activities that highlight the importance of family unity.</p>	<ul style="list-style-type: none"> Storytime focusing on the origins of the family business. Crafts session where children create their own "family crest" using symbols that represent family values. Interactive games that teach teamwork and sharing.