



ABBOT DOWNING

INSTITUTE FOR **FAMILY CULTURE**

FAMILY AND BUSINESS HISTORY

FAMILY BUSINESS TRANSITIONS

FAMILY DYNAMICS, EDUCATION, AND GOVERNANCE

SOCIAL IMPACT ANALYSIS

Investment Products: ► NOT FDIC Insured ► NO Bank Guarantee ► MAY Lose Value

Dedicated to Helping You Craft Your Legacy

IT IS OUR DISTINCT PLEASURE TO INTRODUCE ABBOT DOWNING'S INSTITUTE FOR FAMILY CULTURE.

Family culture provides a distinctive and multifaceted foundation for considering wealth in its fullest context. Grounded in thought leadership and innovation, the Institute for Family Culture and its four centers of excellence are organized around our central vision of helping families build comprehensive wealth plans that contemplate and address the dynamic interdependence of your financial, human, intellectual, and social impact objectives. Families have access to experienced professionals to help you understand and manage the impact of your unique wealth.

Abbot Downing is dedicated to being an ongoing strategic partner and forward-looking resource to help you achieve your goals.



FAMILY AND BUSINESS HISTORY

Sharing and celebrating stories of successes, challenges, and lessons learned can create meaningful engagement across multiple generations in a family and/or a family owned business. The Family and Business History Center is dedicated to helping families and businesses learn about their past and discover their cultural roots as a bridge to planning for the present and future. A team of professional historians with backgrounds in American and world history, medical history, architectural history, military history, and forensics works with a family to unearth answers to their questions, along with memorable stories that define their history. Leveraging historical records and libraries from around the world, these stories reveal the social, economic, political, religious, and cultural circumstances of a family's ancestors and lead to deeply meaningful insights and conversations about past, present, and future connections.

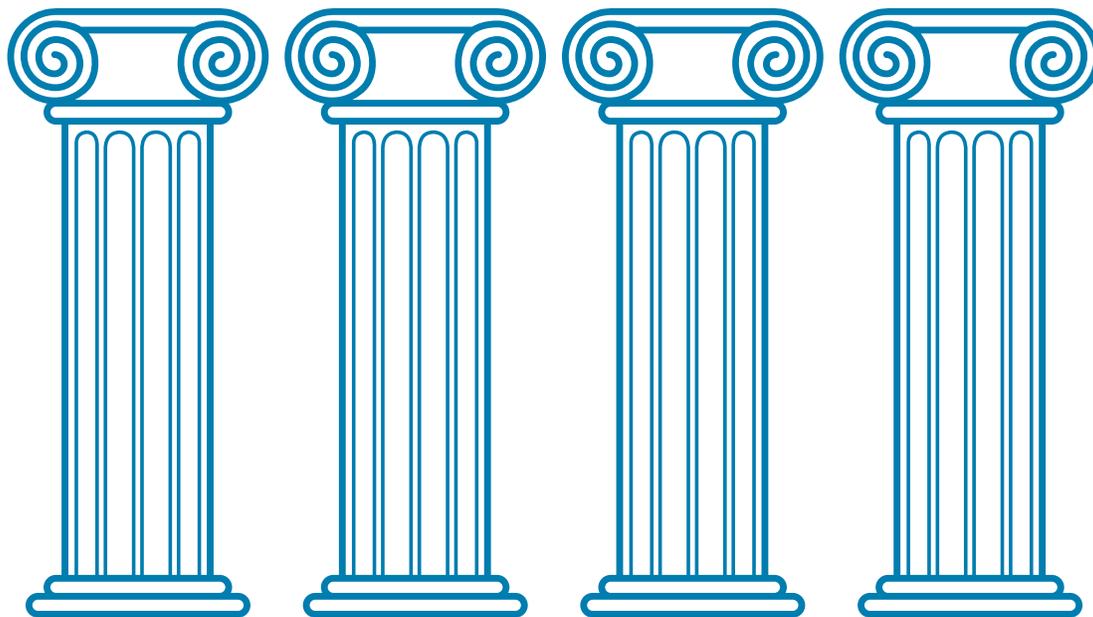


FAMILY BUSINESS TRANSITIONS

Whether family members are owner-managers, non-manager employees, or extended stakeholders of the family business enterprise, managing multiple-role relationships and transitions effectively is critical to the short- and long-term health and maintenance of the business enterprise and the family. The Center for Family Business Transitions helps families manage the overlapping and sometimes competing interests of these constituent groups. Experienced family business professionals provide strategic advice and education, family enterprise coaching, strength-based assessments, and tactical plans in support of family enterprise priorities such as leadership transitions, stakeholder relations, family employment policies, and governance models. In addition, the Center for Family Business Transitions provides timely transition support before, during, and after business liquidity events, as the family *business* enterprise shifts to become a family *wealth* enterprise.

INSTITUTE FOR **FAMILY CULTURE**

Centers of Excellence



FAMILY DYNAMICS, EDUCATION, AND GOVERNANCE

Research on families of unique wealth reveals that managing family dynamics, achieving cultural alignment, adequately preparing and educating wealth stewards for future roles and responsibilities, and implementing effective processes for family decision-making are critical to sustaining wealth and managing its crossgenerational impact. The Family Dynamics, Education, and Governance Center works with multigenerational families, family offices, and foundations to implement these known success factors. We provide topic-focused consultation on a range of family dynamics issues, design customized educational experiences to advance family stewardship goals, and help families implement plans that support family communication, engagement, and governance. The Family Dynamics, Education, and Governance Center delivers tools and processes for aligning crossgenerational values and engaging rising generations of a family.



SOCIAL IMPACT ANALYSIS

Many families aspire to contribute to positive change. This may be in the form of philanthropy, socially responsible investing, or through starting for-profit, for-purpose entrepreneurial ventures. The Center for Social Impact Analysis helps clients define, measure, interpret, and understand causal and correlational relationships between social values, social action, and social impact. Our clients, many of them wealth creators in their lifetimes, increasingly seek to understand the social impact, social changes, and/or social value of investment strategies, organizations, activities, projects, programs, and policies. Helping clients to intentionally consider, plan for, and evaluate the impact of wealth in its fullest context is core to the center's value proposition. A key capability is providing analytically grounded philanthropic consultation that focuses on measuring outcomes.



Attending to the Full Impact of Your Wealth

The Institute for Family Culture offers you a highly experienced consulting team of PhD-level and other advanced degree professionals with backgrounds in education, psychology, history, and business. Through the centers of excellence, you receive integrated strategic advice, ideas, and plans related to family culture issues, opportunities, and objectives. These experienced professional teams work with you on in-depth and longer-term initiatives related to your family culture.

Serving as an academic center, the Institute for Family Culture partners with other renowned academic institutions to create social networking and experiential learning opportunities for families who wish to discuss common interests and exchange successful strategies pertaining to family and community. As a part of our commitment to this effort, the Institute for Family Culture sponsors annual events.

Grounded in thought leadership and innovation, the Institute for Family Culture is steeped in an intellectual curiosity about the unique histories, values, and strengths of individual families and the ways families can build their legacy planning objectives.

Our focus goes beyond financial assets and legal documents. We help ensure your success is in line with your family's values and builds a lasting legacy.

To see how our **Institute for Family Culture** capabilities can help you, please contact your relationship manager or a representative of Abbot Downing.

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Wells Fargo & Company and its affiliates do not provide legal advice. Please consult your legal advisors to determine how this information may apply to your own situation. Whether any planned tax result is realized by you depends on the specific facts of your own situation at the time your taxes are prepared.

Additional information is available upon request.

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