



Family Wealth Transition Planning: Advising Families with Small Businesses (Bloomberg)

Bonnie Brown Hartley, Gwendolyn Griffith

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Managing the transition of family wealth from generation to generation is a daunting task. Families with businesses require inheritance plans that are even more complicated because wealth and worth are often intricately woven into the business. And many transition plans focus only on financial capital and ignore a family's less tangible assets. Other plans detail the intrinsic elements of an inheritance without satisfying the practical issues.

In *Family Wealth Transition Planning*, Bonnie Brown Hartley and Gwendolyn Griffith guide advisers to families with small businesses through the intricate process of preparing and transferring wealth to heirs. The authors take a holistic view of transition planning, focusing on the assets that fall under the umbrella of financial capital, as well as the other key sources of family wealth: human and social capital.

Advisers learn the essentials to achieving successful wealth continuity:

- Healthy family relationships
- Responsible stewardship of wealth, in all forms
- Creation and preservation of the family legacy

Throughout the book, three fictionalized business families, based on Hartley's experience as an adviser, tell their personal stories as they navigate the estate planning process. In this way, Hartley and Griffith demonstrate how to develop wealth transition plans that are wide enough in scope to encompass all forms of wealth yet customized to manage each family's different needs.

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