1. Record Nr. UNINA9910677884703321 Autore McCullough Titolo Wealth of wisdom: top practices for wealthy families and their advisors // edited by Tom McCullough, Keith Whitaker Pubbl/distr/stampa Wiley-Blackwell, 2022 Hoboken, New Jersey:,: John Wiley & Sons, Incorporated,, [2022] ©2022 **ISBN** 1-119-82772-8 1-119-82791-4 1-119-82771-X Descrizione fisica 1 online resource (461 pages) Disciplina 332.02401 Soggetti Estate planning Finance, Personal Families - Economic aspects Family trusts Wealth Lingua di pubblicazione Inglese Formato Materiale a stampa Livello bibliografico Monografia Nota di bibliografia Includes bibliographical references and index. Nota di contenuto Introduction -- Assessing Your Family's True Needs -- SECTION 1 Thinking through What Matters Most -- SECTION 2 Becoming a Learning Family -- SECTION 3 Planning Thoughtfully -- SECTION 4 Investing Wisely -- SECTION 5 Seeking Sound Advice -- SECTION 6 Raising the Rising Generation -- SECTION 7 Navigating Family Dynamics -- SECTION 8 Making Shared Decisions -- SECTION 9 Giving Together "This book will identify and demonstrate the practical activities wealthy Sommario/riassunto families take to ensure their continued success and development. It will be organized into nine sections: Thinking through what matters most Planning thoughtfully Investing wisely Raising the rising generation Making shared decisions Combing family and business Giving well Seeking sound advice Facing the future Global leaders in family wealth will contribute the very best practical tools, exercises, activities, cases

studies, questionnaires, and worksheets that families and their advisors can use. Each section will have an introduction from the authors and will feature chapters from recognized experts on the one of the key topics in the section where they share practical tools that families can use to develop this area of their life and wealth. The book will also contain chapters on the best practices of executing family activities and tips from experienced practitioners to achieve a successful outcome"--