Record Nr. UNINA9910830218603321 Autore Hartley Bonnie Brown **Titolo** Family wealth transition planning: advising families with small businesses / / Bonnie Brown Hartley and Gwendolyn Griffith; with a foreword by James E. Hughes Jr New York, New York: ,: Bloomberg Press, , 2009 Pubbl/distr/stampa ©2009 **ISBN** 0-470-88546-7 1-119-20432-1 1-282-68522-8 9786612685224 0-470-88346-4 Edizione [1st ed.] Descrizione fisica 1 online resource (367 p.) Collana Bloomberg;; v.35 Disciplina 658.1/6 658.16 Soggetti Family-owned business enterprises Lingua di pubblicazione Inglese **Formato** Materiale a stampa Livello bibliografico Monografia Note generali Includes index. Nota di bibliografia Includes bibliographical references and index. Nota di contenuto Family wealth continuity -- The adviser's role -- The family wealth system -- Components and connections -- Cycles of change and equilibrium -- Patterns of wealth behavior -- The external environment -- Wealth transition structures -- Governance systems -- Role clarity and development -- Transitions of wealth in the Williams family --Transitions of wealth in the Hernandez family -- Transitions of wealth in the Marshall family -- The family wealth transition planning adviser's practice. "In Family Wealth Transition Planning, Hartley and Griffith guide Sommario/riassunto 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 assets that fall under the umbrella of financial capital, as well as other undervalued sources of wealth: human and social capital" -- Provided by publisher.