**Sample Website Copy**

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**Family Summit Meetings:**

It’s Not Just Their Inheritance. It’s Your Legacy.

Wealth is hard to create, and it is even harder to maintain. “Shirtsleeves to shirtsleeves,” or “rags to rags in three generations” are popular phrases to describe the challenges and realities associated with wealth transfer across generations. The reality is that it isn’t even the third generation that is the challenge. Over 70 percent of wealth is lost in the second generation and then 90 percent is gone by the third.[[1]](#footnote-1)

Family (or next stewards) Summit Meetings can flip this statistic on its head by engaging the next generation, equipping them to understand and act on your values and intentions for stewarding what has been accumulated, and helping them manage their wealth going forward for generations to come.

**What are you doing to engage your heirs** in carrying forward the legacy you’ve so carefully planned? If the answer is nothing, consider adopting a Family Summit Meeting as a valuable strategy for creating engaging and meaningful multi-generational planning.

(Firm Name) has created a formal structure and unique experience to help you—and your family— do just this. This service includes:

* Comprehensive pre-meeting planning to dig deep about what you want to convey and how
* Coaching to help you convey your wishes effectively
* End-to-end coordination including travel arrangements for your family, as needed
* Full-service meeting event management
* Documented meeting summary and next step coordination
* Family virtual memory vault set-up
* Annual updates and communication to your family

**It’s Never Too Early (or Late) to Begin the Conversation. Let’s Talk.**

To learn more, contact **(name)** at **(email)** or **(000.000.0000)**. We look forward to helping you take the next step to fulfilling your financial plans.

1. https://www.nasdaq.com/articles/generational-wealth%3A-why-do-70-of-families-lose-their-wealth-in-the-2nd-generation-2018-10 [↑](#footnote-ref-1)