



Wealth and the Family: Asking the Essential Questions

*with Charles W. Collier, Senior Philanthropic
Adviser—Harvard University*

Tuesday, February 2, 2010

Jepson Alumni Center at the University of Richmond

In this interactive workshop, Mr. Collier will discuss the challenges and opportunities wealthy families face and how breakthrough conversations can strengthen those families. Attendees will learn about a different kind of conversation to have with potential major gift prospects. They also will learn what all families are up against in making important decisions.

This is a timely, yet complex subject, and one that is relevant to all development staff and volunteers. Please make plans to join us today.

8:30 a.m.

Registration & Continental Breakfast

8:55 a.m.

Welcome and Introduction

9:00 a.m.

The “Simmons” Case Study

- Review the anxiety around family & money
- Who spoiled the children?
- Discuss adult children as co-trustees

9:30–9:45 a.m.

Breakout Conversations

9:45 a.m.

Explore the Family System

- Family, difficult topics, and control
- Family sensitivity to others
- “Individuality” and “Togetherness”
- “Triangles” and “Cut-off”

10:30 a.m.

Break

10:45 a.m.

Revisit the “Simmons” Case

- How has your thinking changed?

10:55 a.m.

The Art of Questions

- Questions as intervention
- Discuss ten questions
- Client decision-making
- Benefits of family meetings

11:25–11:45 a.m.

Breakout Conversations

11:45 a.m. –12:00 p.m.

Question & Answer

12:00 p.m.

Lunch Distribution

12:15 p.m.

Asking Essential Questions: An Interview with Wesley Wright, Jr.

- This discussion between Mr. Collier and Mr. Wright, a volunteer fundraiser, will demonstrate this new context for engaging the family in its decision-making

1:00 p.m.

Adjourn

Take advantage of special cost savings for the workshop by registering more than one person from your organization. This invaluable program will not only benefit you, but also your CEO, board members, and other representatives from your “team.” **Don’t come alone!**

See detailed pricing information on the reverse. Fee includes workshop, which qualifies for 2.75 hours of CFRE continuing education points, continental breakfast and lunch.

Our Speaker:

Charles W. Collier is the senior philanthropic adviser at Harvard University. He has worked with hundreds of individuals to shape their philanthropy, help them make tax-wise gift decisions, and advise them on family relationship issues surrounding wealth. He serves on the committee on the Emotional and Psychological Issues in Estate Planning of the American Bar Association. Mr. Collier holds a BA from Dartmouth College and an MTS from Harvard Divinity School. He completed the postgraduate course on family systems theory at the Bowen Center for the study of the Family. A second edition of his book, *Wealth in Families*, was published by Harvard University in 2006.

___ **Yes, I want to attend the Workshop on February 2nd!**

Registrant Name: _____ vegetarian meal ___

Phone: _____ E-mail: _____

Additional Registrants:

1. _____ vegetarian meal ___

2. _____ vegetarian meal ___

3. _____ vegetarian meal ___

4. _____ vegetarian meal ___

(include additional names on a separate sheet of paper)

Payment

___ VAFRE Member	\$ 50.00
___ Season Pass Holder	\$ 00.00
___ Guest # 1	\$ 75.00
___ Additional Guests: _____ x \$65.00 =	\$ _____

(for each additional guest from the same institution)

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