# Insights From The Williams Group

Fall 2017

## KEEPING UP WITH THE JONESES: SHOULD I TELL MY SPOUSE WHAT WE ARE WORTH?

***NEW* ARTICLE:** People often come to us with this question. They struggle with whether or not to share with their spouse the net worth of the business, or the total assets of the family.

READ MORE

## "I APOLOGIZE" OR "I'M SORRY": IS THERE REALLY A DIFFERENCE?

***NEW* ARTICLE:** We think so. At The Williams Group, we make a distinction between two commonly held expressions: "I apologize" and "I'm sorry."

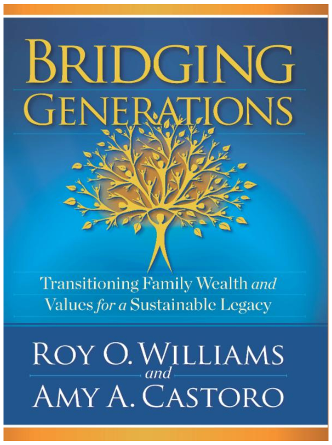
READ MORE

## FOCUSING ON FAMILY PHILANTHROPY: MEET OUR NEW PHILANTHROPIC COACH

***MEET* KATHLEEN LOEHR:** Kathleen is a philanthropic coach to The Williams Group families, drawing from 30 years working in the nonprofit sector where she gained a deep understanding and appreciation for the benefits and joys, as well as the complexities and challenges, of this fast-changing sector.

For a complete list of our coaches and more about Kathleen Loehr, READ MORE

## $18.00 SPECIAL PRE-RELEASE PRICING!
## LIMITED TIME ONLY.




***AVAILABLE* FOR PRE-ORDER:** Our new book will be released November 30, 2017. The book distills over 50 years of investigating how families successfully transitioned their wealth into five practical and attainable steps which families can take to pass on their wealth without destroying the family.

**Order today for $18 plus shipping ($29.95 retail)**

We are thrilled by what people are saying. Here are just a few:

"This book is a must-read for anyone who wants to ensure the wealth they leave their family has a positive impact." Pete Coors, Coors Brewing Company

"Williams and Castoro address one of the biggest pain points business families face. They explain what needs to be done, and they do it in practical terms along with riveting examples." Mitzi Perdue, Perdue and Sheraton Hotels

"As a wealth management professional, I recognize that merely focusing on creating or preserving financial wealth for families we work with is short-changing our clients. Families of wealth also yearn for wise counsel on how their financial wealth can be a force for good." Neil T. Douthat, UBS Financial Services, Inc.

To order your copy click here.

READ THE FOREWORD BY PETE COORS

## ADVISORS: WILL YOUR CLIENT'S WEALTH
## UNITY OR DIVIDE THEIR FAMILY?

***ATTENTION* TRUSTED ADVISORS:** Our talk, "Will Your Client's Wealth Unify or Divide Their Family?" explores how successful families can avoid the 70% failure rate when it comes to generational wealth transition. Attendees learn the driving forces behind this failure rate, how to identify the core issues, and most importantly, what actions to take today to address these issues.

If you're interested in having us speak at your next client family event, contact Sybil Praski at sybil@thewilliamsgroup.org or call 303-877-3708.

**For more articles and insights, visit**
**www.thewilliamsgroup.org**

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