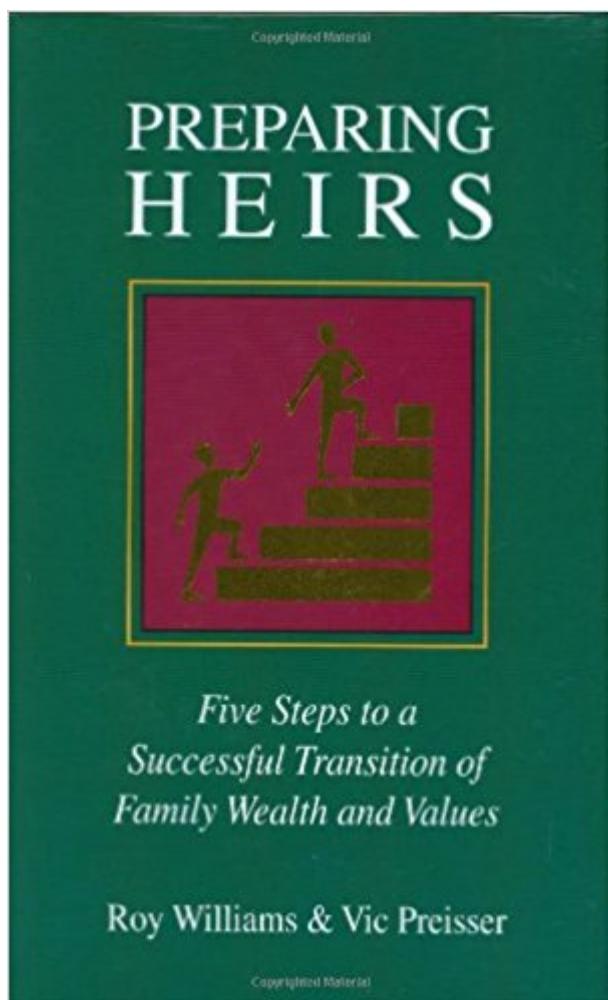


The book was found

# Preparing Heirs: Five Steps To A Successful Transition Of Family Wealth And Values



## **Synopsis**

Preparing Heirs discloses the surprising findings from the authors' research into the legacies of 3,250 wealthy families. With extraordinary insight, they reveal what the relatively small number of successful families had in common-how they achieved and maintained family harmony, and ensured the smooth transition of their wealth to well-adjusted heirs. They also warn of the wide range of factors that cause the majority of wealthy families to fail in their transition. Preparing Heirs offers clear, concise, well-organized, and easy-to-follow instructions that will enable you to evaluate your plan for transitioning family wealth. Preparing Heirs is an assessment tool that can be used in conjunction with the services of qualified professionals such as attorneys and accountants. It addresses the major causes for the 70% failure rate in estate transitions, which lie within the family itself and are within the family's control. This book can help you develop a plan to transmit the family values underlying the accumulation of wealth and prepare your heirs to be good stewards and thoughtful administrators of that wealth.

## **Book Information**

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## **Customer Reviews**

"...a gift for families in planning wealth transfer with trust and harmony." -- Pete Coors, CEO Coors Brewing  
"A very helpful tool for many people facing decisions regarding the transfer of wealth." -- Rosemary B. Hewlett  
"Practical, full of wisdom, and destined to become a classic." -- Jack Canfield, Co-author

Roy Williams has spent nearly 40 years coaching successful families throughout the world. His

earlier books, *Preparing Your Family to Manage Wealth and For Love & Money*, are widely used by estate planners, trust officers, and lawyers. Formerly the Secretary of Social Services and Secretary of Transportation for the State of Iowa, Vic Preisser is a successful entrepreneur and has served in senior executive capacities with Fortune 500 companies.

After reading this book, you may conclude, "Well, that was obvious." Unfortunately, if you are busy building and/or running an empire, the obvious can fall by the wayside, sometimes with disastrous results. I claim that the information in this book is 'necessary but not sufficient' because the simple guidelines in this book may not directly address the complexities of your situation. Nevertheless, it's a good place to start for anyone thinking about estate transition. Skeptics might claim that this book is just an extended infomercial for The Williams Group's estate planning ('coaching') services. The authors certainly don't plan to get rich by selling books, but collecting 1% of large estates through advisory fees looks like a more promising approach. It's interesting that the Williams Group website uses the ".org" suffix despite no sign of having applied for 501(c)3 tax-exempt status. If you decide to give them a call, ask what's going on here. I think that there is enough good high-level information in this book to justify reading it, whether or not you conclude that it's just an infomercial.

Excellent book. Recommend it for other families.

This is a great, well-written book. It includes good food-for-thought for people who want to pass their wealth on so that their heirs have the knowledge and training to keep that wealth.

informative REGARDING THE CHOICE OF A COUNSELOR, BUT NOT INFORMATIVE ABOUT THE STEPS NEEDED.

A short and concise book and read really well. I found it great to get some insight into the way family's manage to maintain their wealth successfully. I will ensure I have this available as a handy reference tool in the office. Amazing level of research and very thought provoking. A must ready for successful intergenerational wealth transfer.

Required reading for any family

Gives insight into adult family planning for the future, easy to read. Have read in conjunction with

others that help.

Great book

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