

DOMAIN EXAMPLES

Business - Financial

Family Office (Gen 3-5)

- Relationship Manager
- Mail Address
- Secretary
- Listener/Problem Solver
- Travel Arranger
- Bill Payer

Family Business (Gen 1-3)

- Personal Assistant
- Board
- Managers

Bank of Mom or Dad (Gen 1-2)

Professionals

- Accountants
- Attorney
- Family Advisors
- Wealth Advisors
- Investment Committee
- Trustee
- Trust Officer
- Trust Protector
- Family Charity(s)

Relationships

Founder (Grandparent)

Parents

Step-parents

Half-siblings

Step-siblings

Extended Family

Cousins, Aunts, Uncles

Family Events

Vacation Homes

Vacations

Personal Financial

Asset Management & Investments

Prenuptial Agreement

Business & Non-Profit Ventures

Staff

- Nanny
- Housekeepers
- Cooks
- Maids
- Gardener
- Driver
- Pet Care
- Security Personnel & System
- Work in Business

Friends – based on money

Friends – early ties (school)

School

College

Country Club

Lunch Club

Fund Raisers

Donees

Non-Profit Board “friends”

Estate Planning

Tax Planning

Investments

Business Venture