



COPPERTREE

Meet John...

John started a real estate development business when he was 33. As the founder and leader of his business, John spent a lifetime growing his business by taking risks and making decisions. His enterprise had become very large and successful.

Now in his late 60's John was ready to invite his 3 children to take over the business. To his dismay, none of them wanted anything to do with his business. None of them wanted much to do with their father for that matter.

Sadly, John spent his entire career "raising" his fourth child, his business. He neglected his real children as he focused on growing his business. Unfortunately, he failed to tell his children what his dream was for them. He wanted his business to become their business and for them to be set for life as a result of what he created.

John was shocked to discover his kids didn't want to have anything to do with the family business. After all, he did this for them. To secure their future.

John's problem: his plan wasn't their plan.

You see. You can have the vision and you can have the plan. You can have all the actions finished and still not have everything you need to guarantee things will happen the way you want them to happen.

That's where we come in. We're experts at aligning family and business values so a long-lasting legacy can be created.

What Jenny Says...

John has some work to do, however, it is never too late for him to begin this important conversation with his family. (Continued on next page.)



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John, in partnership with the Coppertree team, has the opportunity to create a legacy that will last for many generations to come.

While it may not be his children's desire to take over the real estate development business, it is not too late for him to connect with them on a meaningful level.

What are John's hopes for his family? How will he help them understand and embrace his vision? How will he reconnect his actions and decisions with his desired outcomes?

First, John needs to define his story. He needs to help his family understand the connections between where they are currently and the choices and sacrifices they had to make through the years.

Next, John needs to work to define what success looks like for him and his family, both individually and collectively.

Last, John needs a new set of communication skills and leadership tools – to promote alignment and strength – to help him and his family continue to move forward in unity.

Coppertree's expert guidance plus exclusive tools like our Success Mapping Process helped John and his family discover what their version of a well lived life looks like. We helped them unify around a meaningful purpose, not a family asset.

John now has a deeper understanding of the relationships that matter and the actions he must take to transition to the next phase of his life. His family now has a deeper understanding of all that has been done for them, the inspirations behind the actions, and a strategy that virtually guarantees their success.

Their bonds are stronger. Their legacy will last longer.

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