

# FAMILY OFFICE & NEXT GEN PLANNING

TRANSCONTINENTAL TRUSTS: INTERNATIONAL  
JUNE 7, 2019

PRESENTED BY

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Cone  
Marshall



LONG  
REIMER  
WINEGAR



Teton Trust  
Company



# STRUCTURES

Strategy

Sustainability

Success

- ✓ Situs
- ✓ Jurisdiction
- ✓ Taxes
- ✓ Entities (corporation, LLC, statutory foundation, etc.)
- ✓ Family Office
- ✓ Private Family Trust Company
- ✓ Assets – Amount & Type
- ✓ Family Goals (i.e., legacy planning, charitable giving, etc.)

# PLAYERS

People

Process

Planning

- ✓ Advisers
- ✓ Family Members
- ✓ Division of Labor
- ✓ Structure
- ✓ Interest and Expertise

# VALUES

Governance

Guidance

Goals

- ✓ Family Charter
- ✓ Other Governance Documents
- ✓ Letters of Wishes
- ✓ History (i.e., understanding and appreciating prior generations and where family's wealth came from, etc.)
- ✓ Tracking and Measuring Success

# Q&A

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