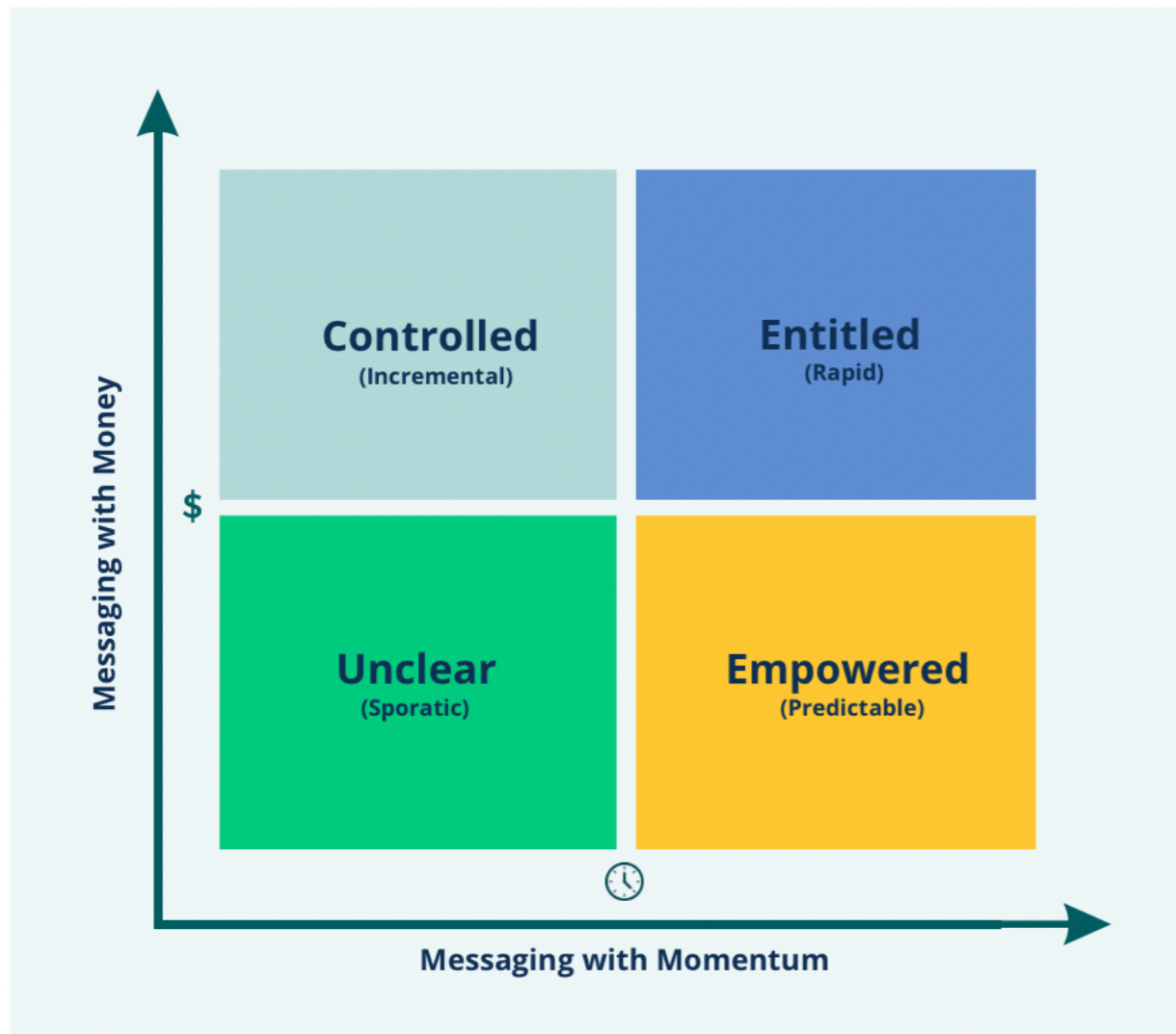


# Wealth Transition the **4** Means of Messaging



- Controlled**  
When in a family asset, money or large gifts are used to influence or control the next gen's choices, time or freedom.
- Entitled**  
When transition is rapid without preparation or merit or overall plan.
- Unclear**  
When turnover of assets is done at the convenience or whim of the grantor sporadically, without overarching plan.
- Empowered**  
When transition is well planned and scheduled based on specific benchmarks and preparedness.

- The process deserves intentionality and care.
- The transition process is meaningful and carries a message.
- How is more important than how much.